

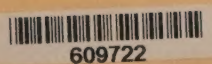
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ACCOUNTS AND PAPERS:

FORTY-SEVEN VOLUMES.

—(37.)—

COMMERCIAL REPORTS—*continued.*

Session

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VOL. LXXXVII.

1894.



ACCOUNTS AND PAPERS:

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1894.
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No 1421.

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AND FINANCE.

J A P A N.

REPORT FOR THE YEAR 1893

ON THE

TRADE, &c., OF YOKOHAMA.

REFERENCE TO PREVIOUS REPORT, Annual Series No. 1255.

*Presented to both Houses of Parliament by Command of Her Majesty,
JULY, 1894.*

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1894.

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JAPAN.

YOKOHAMA.

Mr. Fraser to the Earl of Kimberley.

My Lord,

Tokio, May 18, 1894.

I HAVE the honour to transmit herewith to your Lordship the Yokohama Trade Report for the year 1893, which has been drawn up by Mr. Troup, Her Majesty's Consul at that port.

I have, &c.

(Signed) HUGH FRASER.

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General Remarks.

The above five returns which are transmitted with this report **Returns.** are compiled, as were the returns of former years, from the revised customs statistics of trade, and from consular records. For other information used in this report I am indebted to similar sources as I was in the compilation of the report of a year ago.

(1805)

Rate of silver
dollar.

In the valuation of imports, with the exception of sugar and articles under the heading of Miscellaneous Eastern, and in the conversion of figures representing gold specie and bullion, the customs figures are converted into sterling at the rate of 2*s.* 8 $\frac{3}{4}$ *d.* per yen, or silver dollar, being the average for the year of the quarterly rates used by the customs in their conversions from gold into silver. In the valuation of sugar, miscellaneous eastern imports, and of all exports, and in other calculations in this report, the silver dollar is taken as equal to 2*s.* 6 $\frac{3}{4}$ *d.*, being the mean of the monthly averages of the bank demand drawing rates for the year.

Gross trade,
in 1893, in
gold values.

Following the returns, the total value of the foreign trade of the port for the year amounted to 11,925,285*l.*, being 4,851,555*l.* value of imports, and 7,073,730*l.* value of exports. In last year's return it was pointed out that, to arrive at the figure which Japan actually pays for her imports, there should be added to the customs valuations of imports, which are, with slight exceptions, the first cost of the goods, a percentage in that report taken as 15 per cent. to cover freight, costs, and charges. Applying the same correction to the import figures of 1893, we arrive at a sum of 5,579,288*l.* as the valuation of the import trade of that year and of 12,653,018*l.* as that of the total foreign trade of the port.

Compared
with trade
in 1892.

In 1892 the corresponding figures for imports were 5,385,471*l.*; the value of exports was 8,880,187*l.*, and of the total foreign trade of the port 14,265,658*l.* From this it would appear that the gold valuation of the trade of the port of last year had decreased on that for 1892 by a sum of 1,612,640*l.* It will be seen by a glance at the recapitulation of the tables of imports and exports that this decrease is mainly to be accounted for by a large decrease in the export of raw silk. This will be noticed more particularly in treating of the silk export.

Increase in
imports.
Decrease in
exports and
in gross
trade.
Silver values
of the trade.

Expressed in percentages, the import trade increased last year about 3 $\frac{1}{2}$ per cent., the export trade decreased 20 $\frac{1}{2}$ per cent., and the total foreign trade of the port decreased 11 $\frac{1}{4}$ per cent., in gold values, as compared with those in 1892.

The silver valuation of the trade, as given by the customs, after making the above correction of 15 per cent. on the value of imports, shows as follows:—

				Value.	
				1893.	1892.
				Dollars.	Dollars.
Imports				41,730,829	36,028,209
Exports				55,209,586	61,552,204
Total				96,940,415	97,580,413

Specie and
bullion.

Specie and bullion have been imported to the value of 116,489*l.*, being 4*l.* in gold, and 116,485*l.* in silver, and exported to the value

of 833,025*l.*, being 143,316*l.* in gold, and 689,709*l.* in silver. The export thus exceeded the import by 716,536*l.*

Dues and duties levied by the customs amounted to 356,272*l.*, being 178,221*l.* on imports and 173,397*l.* on exports, and 4,654*l.* miscellaneous. Customs duties.

The feature of the commercial year has been a further enormous fall in exchange, and the derangement caused by this in financial matters. An effect of the fall of the silver dollar has again been to render it difficult to obtain covering prices for imports; and thus, in those branches of trade where home Japanese manufactures come into competition with the imported articles, to afford special protection to the home manufacturer. As regards exports, the stimulating effect of the fall of exchange on those has often been insisted on; but, judging from the character of last year's export trade, it would appear that the instability in the ratio between the two measures of value has produced effects in the commercial world which have more than counterbalanced this stimulus. It will have to be noted, in treating of the silk export, especially, that the derangement in financial matters, more particularly in the United States, has had a very injurious effect on the export trade. In addition to causing these dislocations in trade, the fall of silver in relation to gold has simply proved disastrous where capital has been brought to the east for investment in commercial enterprises entailing liabilities in the west. Characteristics of the year's trade. Effects of the instability of exchange.

The adverse influence on trade of this want of stability in the medium of international exchange has recently been under the special consideration of the local foreign Chamber of Commerce here, which is largely composed of British merchants; and the chamber has resolved to memorialise the London Chamber, and other bodies in Europe and America, and to lend their support to any movement for the re-opening of an international conference with a view to the rehabilitation of silver.

Notwithstanding the advance in the prices of imports, however, caused by the fall of the dollar, it is instructive to note that a large business has been done in imports, and that the Japanese consumer appears to have been able to rise, in the case of several articles, to this advance in prices. This is, no doubt, due to the prosperity which the country has enjoyed for some years, the good crops especially in 1891 and 1892, the large export in silk in the latter year at high prices, and other similar influences. Since the further fall in exchange, however, which has taken place since the close of last year, the import trade in manufactures has been stagnant; and to what extent the Japanese consumer will be prepared to rise to the advanced dollar prices of imports is not yet evident. To say the least, the trade in imports seems likely to suffer great restrictions, and, in the case of articles which come into competition with home Japanese manufactures, probable extinction.

As affecting the economical condition of the country, notice should not be omitted of the yield of rice. It is estimated that last year this crop was 2 per cent. in quantity under an average (1805) Rice crop.

one, and 10 per cent. below that of 1892. The deficiency has occurred in the South of Japan, and was consequent on inundations and typhoons. The quantity available for export has been small, and the quality poor. Prices have ruled high, and at the present time are about on a par with what they stood at in the last year of scarcity, 1889-90. The deficiency of last year's crop would not appear to be sufficient to account for such a rise in dollar prices. Speculation on the rice exchange has undoubtedly something to do with it; but while exportation is free, even allowing that the market abroad for Japan rice is not a large one, it can hardly admit of question that the price of rice in this country is affected by the fall in exchange, just as the prices of other products which form articles of export.

British Trade.

Increase.

The return of the trade between this port and the various portions of the British Empire shows an increase on that in 1892. Adding to the total of imports as given in that return the correction of 15 per cent. which has been applied to the total of the general table of imports, it would appear that the value of imports brought into Yokohama in 1893 from the British dominions amounted to 3,127,055*l.* The value of exports amounted to 1,190,579*l.*, and thus the value of the total trade to 4,317,634*l.* The increase hereby shown on the previous year's trade amounts to 10 per cent., and is distributed over the imports from Great Britain, Australia, Hong-Kong, and British India; and over exports to Great Britain, Canada, Australia, Hong-Kong, and British India. The import trade from Canada is insignificant in amount.

British trade thus amounted last year in value to 34 per cent. of the total trade of the port. The ratio amounted to 27½ per cent. in 1892.

Imports.

Cottons and woollens.

The following estimates of the deliveries of cottons, woollens, and other manufactures are taken from the statistics compiled by the Yokohama General Chamber of Commerce:—

Articles.		Deliveries.	
		1893.	1892.
Cotton yarns—			
English	Lbs.	9,279,200	12,748,000
Bombays	"	522,400	1,258,400
Grey shirtings	Pieces	456,280	400,200
T-cloths	"	75,100	60,082
Indigo shirtings, &c.	"	90,200	127,170
Prints	"	202,969	174,568
Cotton Italians and sateens	"	46,250	43,738
Turkey reds	"	114,400	184,770
Velvets	"	33,190	54,328
Victoria lawns	"	76,730	71,890
Silk-faced satins	"	6,990	17,072
Flannel	"	53,120	57,872
Italian cloth	"	112,650	154,860
Mousselines	"	299,980	415,320
Cloth	"	9,250	7,970
Blankets	Pairs	192,220	176,927

Among piece-goods an increase is thus shown in deliveries of grey shirtings, T-cloths, prints, cotton Italians, Victoria lawns, cloth, and blankets, while indigo shirtings, Turkey reds, velvets, silk-faced satins, flannel, Italian cloth, and mousselines show a decrease.

The increase in shirtings is mainly attributed to an increased demand for 9 lbs. The tendency is towards an increase in fine goods—gassed shirtings; probably ordinary greys have fallen off in deliveries. T-cloths and shirtings of common quality are now manufactured in Tokio, and the imported articles thus meet with formidable rivals in the home-made goods of a lower grade. Shirtings
T-cloths and
shirtings
manufactured
in Tokio.

Importations of the above classes of goods have in general been in sympathy with deliveries. In the cases of flannels and Italian cloth, however, although the deliveries have decreased, importations have increased. Stocks, with a few exceptions, showed increased figures at the end of the year. Stocks.

The competition of the home-manufactured article in yarns is telling against the import trade. There has been a decreased inquiry for ordinary 16/24's and 28/32's. Although there has been a decrease in deliveries of 2/42's twofolds, inquiry still remains for these and for 2/32's twofolds. Fine plain yarns and gassed yarns have been in increased demand. Bombays are disappearing from this market. Yarns.

With the fall in exchange there has been a general rise in dollar prices, and transactions entered upon with exchange fixed have generally resulted satisfactorily. On the other hand, where exchange has not been fixed in advance, loss has usually resulted. In the case of the classes of yarns named above the Japanese purchasers advanced sufficiently to admit of a continuation of business, but, as far as fancies were concerned, prices did not keep pace with the fall of silver. Prices, and
fall of
exchange.

Metals.

The import of metals last year shows an increase of close upon 100,000*l.* in gold value over that of 1892. A similar remark holds good as regards this trade to that which has just been made respecting the import of cottons and woollens, namely, that unless where exchange was fixed when transactions were entered upon, loss has usually resulted to the importer, notwithstanding a general rise in dollar prices. An exception to this has, of course, to be made in cases where sales to arrive were made in sterling, a practice which has largely obtained in the metal trade, as it has to a very limited extent in the trade in cottons and woollens.

Deliveries.

Deliveries generally have been good; the following is an estimate of such:—

Articles.		Deliveries.	
		1893.	1892.
Iron, bar	 Tons	14,678	11,146
„ plates and sheets..	 „	4,239	2,899
„ hoop	 „	517	638
„ pig	 „	8,818	3,559
„ galvanised	 „	1,519	520
„ wire nails	 „	6,773	8,384
Tin-plates	 Boxes	5,540	7,632

Iron.

Deliveries of iron of all kinds, but excluding nails and other manufactured iron, thus amount to 29,771 tons, as against 18,662 tons in 1892 and 21,566 tons in 1891; and the increase, both in the import and in the deliveries, is distributed over all the denominations of this metal except hoop.

Plates and sheets.
Pig.

The increased delivery in plates and sheets may be accounted for by the increased requirements for machinery; that in pig has been mainly owing to the demand for the purposes of the manufacture of water-pipes for the Tokio City Waterworks, a demand which seems not likely to continue, as the industry in question has not proved a success. The increase in galvanised iron has been caused by a demand for the purposes of new building.

Prospects of iron trade.

It would thus appear that, in spite of the increased cost to the Japanese buyer of the above classes of iron caused by the falling exchange, the demand last year has kept up. Since the recent further fall in exchange there has not been the same activity; but the augury for the future stability of this trade, concurrent with the present conditions of production in Japan, is still good.

Wire nails.

The decrease in deliveries of wire nails is accounted for by the higher cost and the probability that, with heavy importations in 1892, dealers commenced the year with good stocks.

Tin-plates.

The business in tin-plates has been a decreasing one; but the anticipation is that a turn will be given to it in other directions from the decrease in the importation of kerosene in cases, and the consequent demand for tin-plates for the manufacture of packing cases for kerosene imported here in bulk, to be transported into the interior in cases.

Stocks of metals, notwithstanding the heavy importations, Stocks of metals.
were at the end of the year smaller than ever before known.

As a rule, the importation of manufactures of metals, Metal manufactures and machinery.
machinery, and the like, maintains its ground. Rails of English make have been in request, the demand coming now for the purposes of private lines. The bulk of the rails imported into the country were 60 lb. and 50 lb. sections, but there is a demand also for 20 lb. and lighter sections for tram-work.

Considerable orders for bridge-work for private lines have also Bridge-work.
been placed, as well as for locomotives. The former have mostly gone to England, whereas American locomotives seem to find Locomotives.
favour with many of the Japanese railway engineers. The import of electric plant is also largely in the hands of Americans. Much of this is now, however, made in Japan. Projects for electric Electric plant.
tramways are spoken of for some of the larger cities; but nothing has yet actually been done in this direction.

Under the heading of machinery, that for spinning purposes Spinning machinery.
again shows a considerable amount, owing to the continued development of the spinning industry in this country. In the report on the trade of Yokohama for the year 1890 it was remarked that the continental packing of machinery and plant Packing.
was more careful than the English. The same is still true; and wonder is sometimes expressed that English makers should spend so much time in the making of machinery well, while they apparently take little pains to secure that it arrive at its destination in good condition. It may also be remarked that English makers do not pay so much attention to the get-up of specifications and drawings as their competitors do. They are Specifications.
apt too, apparently, to think that as data sent from here are often not very complete, business is not likely to result, and hence do not take much trouble to obtain it. The reason for more details not being supplied is that the Japanese engineers are not in most cases able to specify in detail what is wanted, and leave many details to the maker. At the same time, where suggestions are made by the former in the way of what they think improvements, it would be for the interest of the English maker that he paid as much attention to such suggestions as the continental maker appears to do.

At the risk of repeating what has also been alluded to in a Agents necessary.
former report, it should be again noted here that it is not sufficient for makers at home to have travellers or experts visiting this country with a view to business. It is not to be expected that such can meet with much success, unless where working in concert with firms which have connections on the spot and local knowledge.

The sugar import last year shows a further development, mostly Sugar.
under the heading of "browns." The increase in quantity of "whites" is inconsiderable, but an important increase has been established in the market prices here of the latter, probably sufficient to cover the enhanced cost of this class of sugar consequent on the circumstance that the raws, from which the refined

is made, are largely drawn from countries—Java and the Philippine Islands—where gold is the currency.

Deliveries of sugar of all kinds may be estimated at about 75,000 tons, against 70,404 tons in 1892.

Kerosene.

Of the 21,037,624 gallons of kerosene imported last year, 9,884,972 gallons were American oil and 11,152,652 gallons Russian. In 1892 the import consisted of 12,031,410 gallons of American oil, and 4,899,840 gallons of Russian. The total deliveries last year are given at 20,411,190 gallons, consisting of 9,889,520 gallons of American and 10,521,670 gallons of Russian. In 1892 deliveries consisted of 14,532,720 gallons of American and 7,924,090 gallons of Russian. The relative position of the American and Russian is now, therefore, reversed. Total deliveries last year were thus 2,045,620 gallons under those in 1892.

Oil in tank steamers.

The importation of Russian oil in tank steamers was inaugurated here last year, in November. Distribution from the storage tanks is effected by means of drums, old tins and cases, and new tins, which are manufactured on the premises; and sometimes the oil is carried in bulk by means of barges. Deliveries of tank oil to the close of the year amounted to 1,195,090 gallons, against an import of 1,325,160 gallons.

Prices for case oil ranged during the year from 1 dol. 50 c. to 1 dol. 87½ c. per case of 10 gallons. Tank oil was sold at from 12½ c. to 13½ c. per gallon.

**Wool.
Cotton.
Flax, hemp,
and jute.**

Among miscellaneous articles it may be noted that the importation of wool, from Australia mostly, is on the increase, and of raw cotton from the Liverpool market largely; while that of cotton on the seeds has decreased. Flax, hemp, and jute from China and India show a material increase.

Exports.

Raw silk.

The total export of raw silk for the year was 4,946,202 lbs., valued at 3,606,387*l.*, as against 7,209,141 lbs., valued at 5,232,666*l.*, in 1892.

The year commenced with small stocks of the poorer qualities on the market. Prices for the best filatures ranged from 880 dol. to 900 dol. per picul, with exchange on London for 4 month bills at 2*s.* 9¾*d.* A good business, both for Europe and America, continued through the early months of the year, with rising prices, until, indeed, stocks of the better qualities were exhausted. The highest figure touched for best extra filatures was 1,200 dol. in April, exchange at 4 months being then at 2*s.* 9¾*d.*

**Supplies for
1892-93.**

The season, which was over in the early part of June, had proved a profitable one for the Japanese dealers. The supplies for the season on this market amounted to 6,426,700 lbs., as against 6,973,000 lbs. for that of 1891-92.

New crop.

The market for new silk opened in the middle of June, 810 dol. per picul being paid for a parcel of mixed new filatures, as against 650 dol. the previous year. The crop was abundant, and the

quality was good; but, from the depressed state of the markets abroad, the report of a good crop in Italy, and especially the financial difficulties in the United States, and, later, in Italy, the market here remained dull. Prices had to give way; and, even in the face of a fall in exchange to 2s. 6d. in the end of June, and to 2s. 4 $\frac{3}{4}$ d., and lower, in November, and afterwards, those paid for best extra filatures did not exceed 950 dol. in July, and fell to 800 dol. towards the latter part of the year. Stocks, here, in the meantime, went on increasing. The principal business done was for Europe, the American market being dislocated.

Settlements on the market here, together with the export of Japanese merchants, from the opening of the season until the end of the year, amounted to 3,744,666 lbs., as against 4,947,000 lbs. for the same period in 1892. Stocks at the end of the year were estimated at 1,840,000 lbs., bringing, together with the export, the available supplies for the season up to 5,584,666 lbs., or 282,334 lbs. less than at the same date of the previous year.

Of the silk exported during the year about 2,906,000 lbs. went to Europe, and 2,040,000 lbs. to America.

The year 1892 had closed with heavy settlements in wastes. Towards March again business in these was active, and prices maintained. This continued generally until the stock of good qualities was exhausted. In July, wastes from the new crop came on the market, and a fair business in these was done in September, but to a less extent towards the latter part of the year. The quality was good, and supplies plentiful; but as sellers were firm, stocks tended to accumulate, there remaining on the market some 2,400,000 lbs. at the close of the year, and available supplies for the season to date, being 4,440,000 lbs. Further, the low prices of raw silk not improbably interfered with the consumption of wastes, for, when raw silk is at extreme high prices, there arises from this an inducement for consumers to take to wastes as a substitute for the dearer article.

The quantity of tea exported last year was 28,760,693 lbs., or 541,276 lbs. under that exported in 1892. Although stocks of good teas were low in America at the close of the season 1892-93, the prospect of the market there did not seem to warrant high opening prices in Japan; nevertheless, when the market here opened—as it did towards the end of April—silver prices were some 15 per cent. higher than at the commencement of the previous season, and a large business was done at from 10 per cent. to 15 per cent. higher prices than in 1892, an advance greater than was compensated by the lower rate of exchange. A brisk business continued, but with downward prices, and a falling-off in the quality of the tea, through May and June, although advices from the consuming markets were still unfavourable; and, in July, a fresh impetus was given to buying by the great fall in exchange. Little was done in August, but from September to the end of the year a steady business was done.

It is a matter for remark that, in face of the financial position in the United States, and the resulting adverse condition of the export.

markets there, the volume of the export from here has suffered hardly any diminution. This, there seems scarcely room for doubt, is attributable to the stimulating effect on the export of the constantly falling rates of exchange, and the consequent cheapening to the consumer of the gold price of teas. That a similar effect was not felt in silk may perhaps be attributed to the fact that tea is a commodity which can be dispensed with less readily than silk; and, moreover, the Japanese producer must get rid of his tea for the American consumer, when once he has brought it forward for the foreign market; whereas it is open for the silk dealer to arrange to hold over his produce for a better or another market.

Quality. The quality of the tea of the season was, as a rule, indifferent. The destinations of the export were as follows:—

Destinations.	Destination.					Quantity
						lbs.
	United States	..	..	..	..	21,275,000
	Canada	..	..	..	..	6,940,000
	Europe, &c.	..	..	..	..	545,000

Copper. The export of copper from this port has been decreasing year by year. In 1890 it amounted to 11,409 tons; in 1891 to 10,023 tons; in 1892 to 8,748 tons; while last year it fell further to 7,375 tons. Nor is this last decrease to be attributed to a change in the place of shipment of Japan copper; for, whereas the total export of the metal from this country in 1892 was 17,837 tons, last year it fell to 15,218 tons. Prices in Europe during the year having ruled very low, it is only by the fall in exchange that producers have been able to obtain remunerative rates for this export.

Production. The production of copper in Japan in 1891, according to the "Résumé Statistique," was 18,721 tons. In 1890 it was estimated at 17,837 tons.

Prices for refined ingots rose last year from 18 dol. 50 c. per picul in January, to 19 dol. 50 c., and 20 dol. towards the latter part of the year. Since then silver prices have risen to a very high point; and under this stimulus mineowners may be expected to do their best to increase their production.

Clothing. Under the heading of miscellaneous exports it may be noted that the total value of the two items of clothing and raw materials thereof and cotton piece-goods amounts to 111,600*l.*, or not very much under double of the value of the same in 1892. Silk manufactures maintain a total of considerably over 1,000,000*l.* The export of matches has already doubled; while that of umbrellas demands a separate place in the tables, with a value of over 10,000*l.*

Matches. The export of fish oil has nearly doubled.

Umbrellas.

Fish oil.

Rates of Exchange.

Excha. ge. Bank demand drawing rates of exchange on London fell from 2*s.* 8½*d.* in February, which was the highest rate during the year,

to 2s. 3 $\frac{1}{2}$ d., which was the lowest rate touched in December and during the course of the year. This represents a decline of nearly 15 per cent. in the 12 months. A sudden drop from 2s. 8 $\frac{3}{4}$ d., in June, to 2s. 5 $\frac{1}{2}$ d., in July, took place, on the closure of the Indian mints to the free coinage of silver, and rates fell thenceforward continuously to the end of the year. The fall in exchange during the 2 years 1892-93 has amounted to more than 25 per cent. The mean of the monthly averages for last year was 2s. 6 $\frac{3}{4}$ d.

Shipping.

Last year there entered this port 2,159 merchant ships, of an aggregate of 2,063,932 tons. This shows an increase of 81 vessels, and 153,771 tons, on the number and tonnage entering the port in 1892, equivalent to 8 per cent. on the tonnage. Under the British flag there is an increase of 51 vessels and 92,338 tons, or of 17 per cent. on the tonnage. Under the Japanese flag there is little variation. Under the United States flag there is an increase of 26 vessels and 33,650 tons, or nearly 48 per cent. on the tonnage. Under the German flag there is an increase of 11 $\frac{1}{2}$ per cent. in tonnage; and under the French and other flags the variation is inconsiderable.

Under the British flag there entered steamers from the United Kingdom, 87; from New York, 17; from Hamburg and Antwerp, 16; from San Francisco, 21; from Vancouver, 15; from Victoria, B.C., and Tacoma, 16; and from Batoum, 11; the remaining 123 being from Hong-Kong and ports in China and Japan; and sailing vessels from New York, 4; from Guam, 6; from ports in Japan, 4; from Rangoon, 1; which put in in distress, from Victoria, B.C., 10, all sealing vessels, and from the North Pacific Ocean, 6 sealing vessels, 3 of which put back disabled to refit, and 3 entered at the close of the sealing season.

This port has now for the past two seasons become the port of call, after crossing the Pacific, for the British Columbian sealing fleet for the purpose of fitting out for the summer's pelagic sealing cruise in the West Pacific. Besides the ten mentioned above, about five other British sealers thus visited the port for short periods without formally entering.

The proportion, in value, of the trade carried between foreign countries and Japan, in British bottoms, last year amounted to 56 per cent. of the total foreign trade of the country.

Tea freights by Canadian Pacific, Northern Pacific, Pacific Mail, and Occidental and Oriental steamers, and rail to eastern cities of the United States and Canada, stood until the middle of April at 1 $\frac{1}{4}$ c. per lb. gross, when with the opening of the season they rose by the Pacific Mail and Occidental and Oriental Lines to 3 $\frac{1}{2}$ c. per lb. gross, and to 3 c. by the Canadian Pacific and Northern Pacific. They gradually fell through 2 $\frac{1}{2}$ c., 2 $\frac{1}{4}$ c., 2 c., and 1 $\frac{1}{2}$ c., in May, June, and July, reaching 1 $\frac{1}{4}$ c. per lb. gross at the end of that month, at which point they remained until the

end of August. In September they sank so low as $1\frac{1}{2}$ c., but rose to $1\frac{1}{2}$ c. at the end of that month, and to $1\frac{1}{2}$ c. in December. To San Francisco by Pacific Mail and Occidental and Oriental steamers, the rate stood at 10 dol. per ton till the end of June, with the exception of one shipment at 8 dol. in the beginning of June. From the end of June till the end of the year at 8 dol. per ton. By Canadian Pacific and Northern Pacific at 8 dol. throughout, except for one shipment at 10 dol. towards the end of June. By Suez Canal steamers to New York, freights opened at 2*l.* 15*s.*, sinking at the end of January to 1*l.* 15*s.* per ton, until June, when they rose to 2*l.* 5*s.*, and to 2*l.* 10*s.* in July, at which point they remained stationary until the middle of September. They then declined to 2*l.* per ton, remaining thus until the end of the year. By sail to New York they were steady at $1\frac{1}{2}$ c. per lb. gross, or 14 dol. per ton throughout the year.

Silk freights.

Silk freights to European ports by Peninsular and Oriental Messageries Maritimes, or North German Lloyd's line of steamers, were at 5 dol. 60 c. per cwt. up to the end of September. They rose during the last 3 months of the year to 6 dol. 80 c. To New York by Pacific Mail, Occidental and Oriental, and Canadian Pacific steamers and rail, they stood at 8 c. per lb. gross till the middle of April, and by Northern Pacific at 6 c. On May 10 freights were quoted at 5 c. for Pacific Mail and Occidental and Oriental lines, and on May 17 at 4 c. by Canadian Pacific and Northern Pacific lines, at which point all four lines then kept their rates until the end of the year.

General freights.

For general merchandise the rate to London by Peninsular and Oriental steamers ranged from 1*l.* 10*s.* per ton in the first quarter of the year to 2*l.* 5*s.* in April, declining again in May to 1*l.* 15*s.*, at which point it stood until the end of the year. By steamers of the Messageries Maritimes the rates until April were from 1*l.* 15*s.* to 2*l.*, when they rose to between 1*l.* 15*s.* and 2*l.* 5*s.* per ton, remaining steady at the latter rate from June to the end of the year. By North German Lloyd's steamers rates opened at 1*l.* 12*s.* 6*d.* per ton, rising in April to 2*l.* 5*s.* and declining in May to 1*l.* 15*s.*, and again rising in June to 2*l.* 2*s.* 6*d.*, at which point they remained without change until the close of the year. By Ocean, Mutual, and other canal lines and steamers rates stood at 1*l.* 7*s.* 6*d.* until April, when they rose to 2*l.* 5*s.* per ton, declining in May, and for the balance of the year to 1*l.* 15*s.*

Dead weight.

Dead weight (copper) freight, by Peninsular and Oriental steamers to London, varied from 7*s.* 6*d.* to 10*s.* per ton throughout the year; to Hong-Kong 7 c. to 10 c. were taken per picul of $133\frac{1}{2}$ lbs.

Harbour Works.

Harbour works.

In last year's report mention was made of the existence of certain defects in the concrete blocks which had been used in the construction of the breakwaters. This, as was anticipated, has

caused material delay in the progress of these works. Practically they have been at a standstill since this time last year. The report of the committee, appointed to investigate the defects referred to, has lately been published; and it is anticipated that the construction of the breakwaters will now be resumed, in the hope of the whole being carried to completion by March of next year.

The iron pier was completed by the end of March of the Pier. present year. Its total length is 2,413 feet, and there is room for berthing three vessels on each side. It is to be lighted up by electricity. Lines of rail have been laid from the pier-head to the customs compound.

The dredging of the harbour has been proceeded with through- Dredging. out the year.

The construction of the proposed graving docks is still delayed. Graving There is reason, however, to believe that this work will soon be docks. commenced. At a recent general meeting of the promoters it was resolved to fix the capital of the company at 500,000 yen; that the docks be of the following dimensions, viz. :—

					Dimensions.	
					Fest.	
Large dock ..	..	..	..	..	580	140
Middle dock ..	..	..	..	..	450	120
Small dock ..	..	..	..	..	320	74

that work on the large one be commenced before October next, with the view of completing it within 3 years, and that in the meantime the capital of the company be gradually increased up to 1,500,000 yen, whereby it will be possible to proceed with the work of the two other docks, and of the workshops for repairs to vessels in connection with the docks. A piece of land adjoining the harbour, and measuring over 28 acres, has been set apart for the docks.

Population.

The Japanese population of the town of Yokohama on Population. December 31 amounted to 152,142 persons, and of the town of Kanagawa to 16,516, or 168,658 persons in all, an increase of 9,110 during the year 1893.

The foreign population of Yokohama, exclusive of Chinese, amounted on the same date to 1,605 persons, of whom 808 were British. This shows an increase during the 12 months of 17 persons in the general foreign population, and of 45 in the British by itself. The Chinese population is returned at 3,325, being again a slight decrease on what it was 12 months before.

Railway Construction.

Beyond the two lines mentioned in last year's report, the one Railway to extend from Tsuruga, by Kanagawa, into Etchin, the other construction.

Private lines.

from Fukushima, on the main northern line, by Yonezawa and Akita to Awamori, both of which are in progress of construction; there are no Government lines of railway at present being made in the part of Japan east of the Biwa Lake. But, on the other hand, there appears to have been a fresh impulse given to the construction of private lines. It is understood that the company which owns the main line running between Tokio and Awamori have in contemplation the construction of a line from Tokio, through Mito, to Sendai, and that the same company has under consideration the connection of Shimbashi Station, Tokio, with their terminus at Ueno by a direct line across the city. A metropolitan line is at present under construction to the centre of Tokio, near Ueno. The connection of Nagoya with the Kansei Railway at Yokkaichi, by means of a direct line across the Kisogawa, by the head of the Owari Gulf, is being proceeded with. This will afford an alternative and shorter route to Kioto.

Annex 1.—RETURN of Principal Articles of Import to Yokohama during the Years 1893–92.

Articles.			1893.		1892.	
			Quantity.	Value.	Quantity.	Value.
				£		£
Cotton manufactures—						
Chintzes (prints) ...	Yards	...	5,687,262	63,213	3,807,430	42,207
Drills ...	"	...	459,353	8,052	965,499	17,051
Sateens... ..	"	...	1,623,009	29,129	1,236,282	23,371
Shirtings—						
Grey ...	"	...	19,973,805	169,463	16,496,026	136,881
Dyed... ..	"	...	1,219,788	16,822	901,087	16,039
Twilled ...	"	...	1,189,075	11,556	980,438	9,779
White ...	"	...	1,124,612	14,367	2,839,189	29,821
T-cloths ...	"	...	1,705,106	14,743	1,462,368	11,402
Thread ...	Lbs.	...	41,856	5,511	75,129	9,656
Turkey-reds ...	Yards	...	3,346,009	26,010	3,699,972	30,517
Velvets... ..	"	...	1,411,332	35,925	1,898,327	50,426
Yarn—						
Cotton (Indian) ...	Lbs.	...	505,785	13,845	1,225,518	30,489
" (excluding Indian)	"	...	11,547,992	487,253	13,365,960	506,394
Sundries ...		...	...	25,060	...	15,025
Total ...		...	...	919,949	...	929,060
Woollen manufactures—						
Blankets ...	Lbs.	...	1,009,878	59,900	729,709	43,731
Cloths ...	Yards	...	599,443	81,072	497,189	75,517
" (part wool) ...	"	...	494,196	32,615	306,183	21,576
Flannels ...	"	...	2,118,937	86,613	1,637,518	73,891
Italian cloths ...	"	...	4,009,544	132,322	2,476,777	87,991
Mousseline de laine ...	"	...	6,629,411	137,738	9,199,662	199,032
Serges ...	"	...	7,029	709	78,328	3,674
Yarn, woollen ...	Lbs.	...	495,304	48,707	459,967	46,291
Sundries ...		...	...	19,561	...	16,185
Total ...		...	...	599,237	...	565,912
Metals and manufactures of—						
Iron—						
Bar and rod ...	Tons	...	14,004	79,031	10,720	64,943
Rail ...	"	...	10,730	44,031	...	...
Plate and sheet ...	"	...	4,099	28,238	2,963	22,048
Nails... ..	"	...	6,446	65,325	7,547	79,621
Pig ...	"	...	8,643	19,090	3,044	7,620
Various ...	"	...	...	46,768	...	38,512
Ware... ..	"	...	...	54,762	...	41,801
Lead, sheet and tea ...	Tons	...	1,519	21,713	1,895	25,923
Quicksilver ...	"	...	57	11,846	41	8,869
Steel ...	"	...	1,536	20,839	1,691	22,828
" ware ...	"	...	...	9,916	...	...
" wire ...	Tons	...	639	24,730	481	16,956
Telegraph wire ...	"	...	1,184	12,156	1,053	11,837
Zinc ...	"	...	688	11,723	497	11,170
Sundries ...		...	...	43,533	...	41,666
Total ...		...	...	492,691	...	392,794
Sugar—						
Brown ...	Tons	...	42,309	314,974	37,699	309,481
White ...	"	...	29,676	470,364	29,464	460,778
Sundry... ..	"	...	...	8,748	...	9,337
Total ...		...	...	794,086	...	779,596
Kerosene oil ...						
Gallons ...		...	21,037,624	269,616	16,931,250	256,446
Miscellaneous, western—						
Alcohol ...	Lbs.	...	4,957,804	41,554	4,565,838	47,267
Arms and munitions of war ...	"	...	...	53,695	...	148,111
Beer and porter ...	"	...	...	8,053	...	10,152
Books ...	Number	...	136,034	12,470	139,814	13,634
Carpets ...	"	...	...	5,333	...	...
Cigarettes ...	"	...	...	34,133	...	24,239
Clocks and fittings ...	"	...	...	15,243	...	20,330
Clothing and haberdashery ...	"	...	...	32,912	...	32,473
Coal ...	Tons	...	4,695	7,020	...	...
Coral beads ...	Lbs.	...	3,676	3,722	...	...
Drugs, medicines, and chemicals ...	"	...	...	99,509	...	110,040
Dyes, aniline ...	"	...	344,384	30,500	406,983	36,704

(1805)

B

RETURN of Principal Articles of Import to Yokohama during the
Years 1893-92—continued.

Articles.		1893.		1892.	
		Quantity.	Value.	Quantity.	Value.
			£		£
Miscellaneous, western—con-					
tinued—					
Dyes and paints		...	36,657	...	31,460
Dynamite	Lbs. ...	124,548	6,899	...	39,928
Engines, steam boilers, &c. ...	...	...	6,414	...	18,877
Flour	Lbs. ...	11,666,801	37,320	8,331,452	12,720
Glass and glassware	...	...	27,721	...	17,607
Handkerchiefs	...	...	16,768	...	24,001
Hats and caps	Dozens ...	19,946	12,892	24,070	17,537
India-rubber ware	...	...	50,042	...	22,325
Indigo, dry	Lbs. ...	550,808	20,644	...	21,505
Instruments and implements	...	...	...	...	16,407
Locomotive engines and	...	...	...	...	...
Boilers	...	...	23,220	...	...
Logwood, extract of	Lbs. ...	1,283,808	21,600	967,505	...
Machinery—					
Milling	...	...	2,184	...	36,720
Spinning	...	...	19,892	...	48,340
Various	...	...	50,210	...	18,000
Milk, condensed, &c.	...	...	14,604	...	...
Oil and wax, various	...	...	14,604	...	...
Paint, in oil	Lbs. ...	715,868	7,114	785,077	...
Paper, printing	...	2,406,763	21,807	2,090,008	...
Potash	...	...	13,135	...	42,000
Provisions and stores	...	...	41,165	...	...
Railway carriages, and	...	...	...	...	...
parts of	...	...	7,185	...	...
Saltpetre	Tons ...	526	8,024	704	9,408
Satins, silk, and cotton	...	...	...	...	...
mixtures	Yards ...	122,928	9,374	365,168	31,070
Soda, caustic	Lbs. ...	2,002,008	8,140	...	...
Stationery and paper,	...	...	...	...	...
various	...	...	29,102	...	31,840
Steamers	Number ...	2	42,547	...	...
Tobacco, prepared, in-	...	...	...	...	...
cluding cigars	Lbs. ...	166,510	16,088	149,345	16,810
Watches and fittings	...	...	66,412	...	...
Wines and spirits	...	...	32,000	...	...
Wool	Lbs. ...	919,712	46,292	841,613	...
Sundries	...	...	178,612	...	160,445
Total	...	...	1,241,304	...	1,278,071
Miscellaneous, eastern—					
Beans, peas, and pulse	Lbs. ...	9,277,316	48,008	5,399,011	1,477
Cotton, raw	...	17,498,700	263,110	16,710,536	244,004
" on seeds	...	34,980	175	1,606,097	...
Drugs and medicines	...	...	22,848	...	21,200
Fans, hand and other	Lbs. ...	3,073,761	24,740	1,814,395	18,588
Horn, horns, ivory, and	...	...	...	...	...
skins	...	...	19,676	...	21,545
Leather	Lbs. ...	1,000,008	53,600	1,288,000	77,001
Mats, packing	Number ...	1,000,000	7,400	1,400,000	...
Oil-cake	Tons ...	5,708	7,424	685,004	...
Rice	...	17,705	80,124	6,238	...
Sundries	...	...	29,700	...	10,000
Total	...	...	328,078	...	477,427
Japanese produce	...	...	2,604	...	2,812
Recapitulation—					
Chinese manufactures	...	...	919,940	...	920,000
Woolen	...	...	500,200	...	300,000
Manila	...	...	492,004	...	100,000
Sugar	...	...	204,000	...	200,000
Rubber	...	...	269,000	...	200,000
Manila	...	...	...	...	...
Western	...	...	1,241,304	...	1,278,071
Japanese	...	...	328,078	...	477,427
Japanese produce	...	...	2,604	...	2,812
Grand total	...	...	4,801,506	...	4,082,000

Annex 2.—RETURN of Principal Articles of Export from the
Port of Yokohama during the Years 1893–92.

Articles.		1893.		1892.	
		Quantity.	Value.	Quantity.	Value.
			£		£
Silk—					
Raw	Lbs. ...	4,946,202	3,606,387	7,209,141	5,232,666
Tama	" ...	3,933	842	32,629	7,349
Noshi	" ...	2,138,828	197,861	2,738,489	267,643
Waste	" ...	1,557,810	113,478	2,168,841	141,404
Floss	" ...	451,710	224,059	121,567	4,829
Total		9,098,493	3,942,627	12,270,867	5,653,891
Cocoons, including pierced and waste	Lbs. ...	498,869	50,576	419,329	44,670
Tea—					
Green, pan fired	" ...	19,588,953	468,914	16,925,427	434,738
" basket fired	" ...	5,267,866	130,774	8,257,215	196,492
Dust	" ...	3,087,130	12,591	2,853,612	12,933
Sundry	" ...	817,244	5,375	1,265,715	9,053
Total		28,760,693	617,654	29,301,969	653,216
Rice	Tons ...	119	936	259	2,260
Coal	" ...	58,503	37,662	83,131	71,132
" foreign re-exported	" ...	5,651	12,782	4,044	10,771
Total		59,154	50,414	87,175	81,903
Copper	Tons ...	7,375	271,231	8,748	335,258
Fish and shell-fish, dried and various	Lbs. ...	10,518,410	129,530	6,438,288	94,860
Miscellaneous—					
Brönze ware			16,449		19,876
Clothing apparel and raw materials thereof			29,521		18,395
Cotton piece-goods	Pieces ...	637,168	82,080	322,831	46,605
Drugs, medicines, dyes, and paints	Lbs. ...	2,958,417	8,623	3,972,997	17,631
Fans	Number ...	2,978,506	8,843		
Fish oil	Tons ...	6,966	53,629	3,891	31,600
Furniture			6,163		7,613
Furs	Number ...	117,450	9,762	93,347	10,217
Ginseng	Lbs. ...	176,638	25,284	131,044	19,387
Iriko, or Béche-de-Mer	" ...	521,618	17,489	572,784	20,273
Ivory ware			10,778		8,289
Jinrikisha	Number ...	1,589	4,686		
Kanten, or colle végétale	Lbs. ...	192,121	7,757	151,081	7,826
Lacquered ware			68,831		56,788
Lily bulbs			6,543		
Matches	Gross ...	468,802	14,818	233,205	8,106
Menthol crystal	Lbs. ...	16,037	7,030	21,640	7,922
Mineral products, un- enumerated... ..			16,663		
Mushrooms	Lbs. ...	364,916	14,268	446,620	18,416
Paper, various			34,205		29,956
" ware			16,622		15,067
Pictures			6,730		
Porcelain and earthenware			84,244		85,493
Peppermint oil	Lbs. ...	42,408	15,591		
Seaweed, cut and various	" ...	31,575,157	73,974	27,051,796	71,220
Shippo ware, or cloisonné			8,463		8,049
Silk—					
Handkerchiefs	Dozen ...	1,706,079	494,777	1,458,078	499,201
Manufactures, other			62,519		45,573
Piece-goods, habutae	Pieces ...	200,579	454,991	239,937	581,137
" other	" ...	37,103	59,714	25,992	49,321
Straw plaits	Bundles ...	943,018	32,281	535,996	15,374
Tobacco leaf		554,908	7,087	723,263	9,644
Umbrellas, European	Number ...	149,829	10,374		
Wooden ware			29,799		29,825
Sundries			185,486		231,782
Total			1,981,079		1,970,586
Foreign produce and manu- factures			29,633		43,593

RETURN of Principal Articles of Export from the Port of
Yokohama during the Years 1893-92—continued.

Articles.		1893.		1892.	
		Quantity.	Value.	Quantity.	Value.
			£		£
Recapitulation—					
Silk		...	3,942,627	...	5,653,891
Cocoons		...	50,376	...	44,070
Tea		...	617,664	...	653,216
Rice		...	936	...	2,260
Coal		...	80,414	...	81,903
Copper		...	271,281	...	335,258
Fish		...	129,530	...	94,666
Miscellaneous		...	1,981,079	...	1,970,596
Foreign produce and manu- factures		...	29,633	...	43,593
Grand total		...	7,073,730	...	8,860,187

Annex 3.—RETURN of British Trade during the Years 1893-92.

Country.	1893.			1892.		
	Imports.	Exports.	Total.	Imports.	Exports.	Total.
	£	£	£	£	£	£
Great Britain	1,910,720	391,735	2,302,455	1,741,290	320,272	2,061,562
Canada and other	1,338	151,768	153,104	4,272	103,244	107,516
Australia	28,617	9,898	38,503	19,778	7,330	27,108
Hong-Kong	488,205	497,578	985,783	478,376	488,213	966,589
British India	290,298	139,614	429,912	281,322	100,496	381,817
Total	2,719,178	1,190,579	3,909,757	2,625,028	1,019,554	3,644,582

Annex 4.—RETURN of Shipping Entered at the Port of Yokohama
(Kanagawa) during the Year 1893.

Nationality.	Steam.		Sailing.		Total.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.
British	306	614,316	21	17,313	327	631,629
Japanese	1,640	1,148,530	137	23,610	1,677	1,172,140
American (U.S.)	24	86,707	24	17,162	58	103,869
German	51	89,102	2	3,147	53	92,249
French	26	84,335	1	1,320	27	85,655
Austro-Hungarian	3	3,815	...	...	3	3,815
Swedish and Nor- wegian	2	1,963	1	649	3	2,612
Danish	...	...	1	1,691	1	1,691
Dutch	1	652	...	...	1	652
Total	1,362	1,969,445	137	64,482	1,499	2,033,927

Annex 5.—RETURN of all British and Foreign Residents and
British and Foreign Firms at the Port of Yokohama
(Kanagawa), on December 31, 1893.

Nationality.	Number of Residents.	Number of Firms.
British	808	69
American (United States) ..	253	29
Austro-Hungarian	22	2
Belgian	4	..
Chinese	3,325	239
Danish	7	1
Dutch	60	4
French	133	6
German	151	26
Italian	19	2
Mexican	1	..
Portuguese	65	1
Russian	9	1
Swedish and Norwegian ..	10	..
Spanish	11	2
Swiss	52	11
Total	4,930	393

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N^o 1443.

DIPLOMATIC AND CONSULAR REPORTS ON TRADE
AND FINANCE.

JAPAN.

REPORT FOR THE YEAR 1893

ON THE

TRADE OF NAGASAKI.

REFERENCE TO PREVIOUS REPORT, Annual Series No. 1253.

*Presented to both Houses of Parliament by Command of Her Majesty,
JULY, 1894.*

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J A P A N.

NAGASAKI.

Mr. Fraser to the Earl of Kimberley.

My Lord,

Tokio, May 18, 1894.

I HAVE the honour to transmit herewith to your Lordship the Nagasaki Trade Report for the year 1893, which has been drawn up by Mr. A. M. Chalmers, Acting-Consul at that port.

I have, &c.

(Signed) HUGH FRASER.

Report on the Trade, &c., of Nagasaki for the Year 1893.

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General Trade.

The total foreign trade of Nagasaki for the year 1893 amounted to 871,640*l.*, showing a decrease of 48,077*l.* as compared with the preceding year. The figures for the two years are as follows:—

(1807).

A 2

				Value.	
				1893.	1892.
				£	£
Imports ..	..	..	..	458,301	438,237
Exports ..	..	..	..	413,339	481,480
Total ..	..	..	..	871,640	919,717

It will be observed that exports show a total falling off of 68,141%, while imports, on the other hand, have increased 20,064%. The decrease in exports is mostly due to a falling off in the coal supply, and the increase in imports may be accounted for by an unusually large importation of rice.

Imports.

Cotton manufactures. Cotton manufactures remain at about the same figure as last year, and the import is now one of very small moment.

Importation of cotton for trade with Corea was also trifling and the trade with that country continues to decline.

Woollen and mixed cotton and woollen. The import of woollen manufactures shows an increase of nearly 1,000%, but remains quite insignificant.

Metals. The metals imported are of a very miscellaneous order, the principal demand being for pig-iron, iron rod, sheet, nails, and pipes.

Sugar, brown. The import of brown sugar shows an increase on that of 1892 of 7,491% and 1,978,107 lbs. The greatest monthly import was during April, amounting to 1,338,021 lbs. valued at 5,657%. This trade is for the most part in the hands of Chinese, though 3,143,776 lbs. valued at 12,123% were imported by Japanese merchants.

Sugar, white. The importation of white sugar shows a slight decrease as compared with 1892 amounting to 209,651 lbs.

The total import was 2,892,001 lbs. valued at 85,717%. The demand was brisk from April till November and throughout the year prices were good.

There is an undertaking on foot to construct a sugar refinery at Moji, which will have a serious effect on the trade of Nagasaki as far as refined sugar is concerned, but this may be compensated for by an increased importation of the raw material. The success or otherwise of this undertaking will have an important bearing on the import of sugar throughout the country, the import of the raw material being to so large an extent in the hands of Japanese and Chinese merchants.

Kerosene oil. The import of kerosene oil has increased in quantity 47.075 gallons, but shows a falling off in value of 6,185%. Stocks at the beginning of the year were about 35,000 cases, and imports

during 1893 were eight cargoes or part cargoes of American, amounting to 260,000 cases, and two part cargoes of Russian, about 34,000 cases, aggregating in all about 329,000 cases, most of which went into consumption during the year, there being only about 10,000 cases on hand at the end of the year. The consumption shows an increase of about 10,000 cases of American oil and a decrease of about 7,000 cases Russian oil as compared with 1892. The trade continues to favour the American oil, and a considerably higher price is usually obtained for it. The year was a fairly good one both for importers and dealers, stocks being comparatively low and prices being consequently better during most of the year.

Tanks for the storage of Russian oil in bulk are in course of completion and will probably be ready for use during the spring of 1894.

Dealers have been very careful about making contracts for forward deliveries on account of the erection of these tanks, and it is expected the importation of oil in bulk will seriously affect present interests.

Re-export to Corea was less than in 1892, partly owing to short stocks here during the winter months. Only about 29,000 cases went from here.

Only 2,660 tons of coal, Cardiff, were imported during 1893, ^{Coal.} solely for the use of foreign ships of war.

The import of raw cotton again shows a considerable increase ^{Raw cotton.} being 8,293,687 lbs., as against 7,164,472 lbs. in 1892, valued at 130,129*l.*, as against 123,212*l.*, an increase of 6,917*l.*

The native production of raw cotton is now of small account, producers being quite unable to compete with the importers. By far the greatest supply of this article comes from China, whence were imported 7,009,445 lbs., valued at 108,004*l.* India holds the second place, the figures being 1,212,325 lbs., valued at 20,871*l.* From America 71,882 lbs., valued at 1,254*l.*, were imported during the year.

The import of hides has dwindled down to 235,630 lbs., valued ^{Hides.} at 2,996*l.* They came entirely from Corea, but the trade in this article with Nagasaki is dying out, Corean hides now going almost exclusively to Osaka. The prevalence of cattle disease during 1892 interfered seriously with the production of this article.

This staple was imported during 1892 to the amount of 8,891 ^{Rice.} tons, valued at 50,929*l.* The shipments arrived during the last 3 months of the year, 8,764 tons, valued at 47,674*l.*, coming from Annam. The remainder was imported from China, Corea, and Siam.

This article of import shows a falling-off of 6,772,647*l.*, as ^{Oil-cakes.} compared with 1892, and a difference in value of 11,026*l.*

Two steamers were imported during the year.

^{Steamers.}

Exports.

Teas. The export of tea in 1893 amounted to 10,050*l.*, as against 6,839*l.* in 1892. Native sellers continue to ship their stocks direct to Kobe where there is a better market.

Rice. Rice was exported during the greater part of the year to the total amount of 4,383 tons, valued at 31,258*l.* For the reasons explained in last year's report on the trade of Nagasaki, the rice grown in this neighbourhood is more easily shipped from Moji. The total export from that port in 1893 was 9,085 tons, valued at 54,569*l.*

From Nagasaki the greater part, that is to say 4,215 tons, valued at 30,006*l.*, were exported to Russia.

Coals. The total export of coals from this port during 1893 amounted to 381,631 tons, valued at 156,459*l.*, a falling-off as compared with 1892 of 36,646 tons.

The returns for Takashima coal are as follows:—

TAKASHIMA Net Output during the Year 1893.

Description.					Quantity.
					Tons.
Large coal	..	..	..	..	125,304
Small "	..	..	..	..	127,016
Total	..	..	..	..	252,320

SALES and Destination.

Ports.	Quantity.		
	Large.	Small.	Total.
	Tons.	Tons.	Tons.
Hong-Kong	11,935	37,990	..
Shanghai	14,085	34,514	..
Yokohama	25,175	2,135	..
Osaka	564	7,001	..
Singapore	11,627	5,270	..
Three other ports	4,231	891	..
Total	67,617	87,301	..
Bunkers, &c.	68,925	62,941	..
Grand total	136,542	150,242	286,784

The stocks of Japanese coal available on December 31, 1893, were only about 3,000 tons, and through the year the mines were unable to meet the foreign demand, local shipping requirements consuming the greater part of the output.

While the export of coal from this vicinity shows a decrease the export from the special ports of export has considerably increased. The figures are as follows :—

Ports.				Quantity.	Value.
				Tons.	£
Shimonoseki	..	..	..	64,087	..
Moji..	..	..	..	431,259	..
Karatsu	..	..	..	42,292	..
Kuchinotsu..	..	..	..	452,524	..
Total	..	..	..	990,112	386,715

This table shows an increase of 281,378 tons as compared to 1892.

The export of flour shows a serious falling-off, the figures Flour. being for 1893, 1,100,888 lbs., valued at 4,020*l.*, as compared with 3,289,416 lbs., valued at 14,242*l.*, in 1892

Shipping.

The total shipping entered in the port of Nagasaki during 1893 was 713 vessels carrying a tonnage of 950,540 tons. As compared with the preceding year this shows a decrease of 20 vessels, but an increased tonnage of 52,266 tons. At the commencement of the year the Pacific Mail and the Occidental and Oriental Steamship Companies sent their regular mail steamers here for coaling purposes. Several of these steamers are British, but the United States now figure for the first time for many years in the shipping returns of this port. Fifteen United States steamers called during the year with a carrying capacity of 35,784 tons. British shipping shows a decrease of 14 vessels, but an increased tonnage of 401,525 tons, as compared with 372,638 tons in 1892. Norwegian shipping shows an increase of 17 vessels and 9,500 tons.

KUCHINOTSU.

The total shipping that entered Kuchinotsu during the year was 224 vessels and 237,647 tons, of which 84 vessels and 131,404 tons were British.

Norwegian shipping with 29 vessels and 40,818 tons shows an increase of 20 vessels and 22,007 tons as compared with the preceding year.

MOJI.

The shipping at this port has more than doubled itself in the year judging by the tonnage entered. The total is 342 vessels with 495,906 tons, as against 209 vessels with 247,296 tons in 1892. an increase of 133 vessels and 248,610 tons. Of this total 228 vessels and 384,004 tons are British, as against 123 vessels and 178,868 tons in 1892. Norway again shows an increase, her shipping being 20 vessels with 14,834 tons burden, as against 6 vessels with 4,974 tons in the preceding year.

A new feature in the table of shipping for Moji is the entrance of 13 Austrian vessels, with a tonnage of 30,500 tons.

Total
shipping in
consular
district.

The total shipping for the three ports within this Consular district amounts to 1,279 vessels and 1,684,093 tons, as against 1,107 vessels and 1,322,240 tons in 1892.

Japanese shipping shows a falling-off of 29 vessels and 16,587 tons; German shipping of 14 vessels and 5,377 tons. Britain, on the other hand, shows an increase of 107 vessels and 254,374 tons, and Norway an increase of 51 vessels and 41,376 tons, nearly doubling her tonnage for 1892.

Public Works.

The only item of information on this head is that the construction of the railway line between Saga and Tsukazaki was commenced during the year under review. Tsukazaki is about 45 miles from Nagasaki.

The immediate approaches to Nagasaki present great engineering difficulties, and the Kiushiu Railway Company do not seem disposed at present to grapple with them nor to meet the expense.

Local Industries.

Cotton
spinning

The cotton spinning industry is progressing favourably. Owing to cheapness of labour most of the factories can obtain excellent prices. Cost of labour in Miiki averaged for the year 17.37 sen (about 5d.) a day per man, and 7.85 sen per woman; at Kurume, 15.05 sen per man, and 9.95 sen per woman; at Kagoshima 15.35 sen per man, and 5.57 sen per woman. At the last-mentioned place the day averaged 10½ hours, while at Miiki and Kurume the spindles were working 23 hours and 24 hours a day throughout the year, excepting holidays. The threads manufactured are for the most part (excepting Kagoshima) Nos. 16 to 16½, and the prices obtained about 88 yen per bale (of about 400 lbs.).

In Nagasaki the cotton factory is hampered by scarcity of labour, and is only able to work 12 hours in the day. Through the year the factory was working 324 days. The small output is due to want of experienced workmen, but owing to the cheapness

of silver as compared with gold they are able to compete with the imported manufactures and command good prices, about 88 yen per bale as above stated. The Nagasaki mill finds its market in Osaka and in Oita and Kumamoto Kens.

The electric light company in the town of Nagasaki has a capital of 40,000 dol., consisting of 1,600 shares at 25 dol. The income for 1893 was 3,790 dol. 93 c., and expenditure 2,926 dol. 11 c., leaving a margin of profit amounting to 864 dol. 82 c. The plant and wires are valued at 33,498 dol., but additional machinery is being ordered from Osaka.

General Remarks.

Trade between Europe and this port has reached a very low ebb, mostly owing to the disastrous fall in exchange. It may, however, be partially accounted for by the gradual development of local industries throughout the country, which are becoming efficient enough to meet the limited requirements of this locality.

Exports to England have dwindled from 16,189*l.* in 1891, 5,748*l.* in 1892, to 3,128*l.* in 1893. Imports also have dwindled from 164,266*l.* in 1891, 77,293*l.* in 1892, to 64,627*l.* in 1893.

The export trade to Russia, amounting to 54,133*l.*, is for the most part a miscellaneous trade with Vladivostock.

Annex 1.—RETURN of Import Trade of Nagasaki for the Years 1893–92.

Articles.		1893.		1892.	
		Quantity.	Value.*	Quantity.	Value.†
Cotton manufactures ...	...	...	£ 2,183	...	£ 2,136
Woolen and mixed cotton and woollen ...	...	...	1,814	...	856
Metals, miscellaneous ...	...	...	13,481	...	15,864
Sugar—					
White ...	Lbs. ...	12,892,001	85,717	13,101,652	87,756
Brown ...	" ...	6,015,897	25,848	4,037,790	18,357
Miscellaneous, Western—					
Machinery, various ...	...	...	6,153	...	9,837
Pumps, and parts of ...	...	...	...	...	13,562
Railway carriages, and parts of ...	...	...	...	...	7,505
Coal ...	Tons ...	2 660	3,912	6,221	8,747
Drugs ...	...	...	3,122	...	3,725
Dyes ...	...	...	7,371	...	5,073
Beverages, provisions, &c. ...	...	...	8,325	...	8,580
Silks and satins ...	...	...	5,778	...	6,336
Wine, spirits, beer, &c. ...	...	...	3,528	...	3,628
Kero-sene oil ...	Gallons ...	2,647,215	34,116	2,600,140	40,301
Steamers ...	Number ...	2	22,529	1	12,194
Miscellaneous, Eastern—					
Raw cotton ...	Lbs. ...	8,293,687	130,129	7,164,472	123,212
Beans, pulse, &c. ...	" ...	3,407,167	6,647	2,898,005	5,791
Rice ...	Tons ...	8,891	50,929	687	4,294
Oil-seeds ...	Lbs. ...	14,238,070	16,816	21,010,717	27,942
Hides ...	...	235,680	2,996	325,486	5,218
Sundries ...	" ...	...	26,807	...	27,333
Total ...	...	...	468,301	...	438,237

* 1 dol. = 2*s.* 8*d.*, except for sugar and miscellaneous, Eastern, which have been converted to sterling at 2*s.* 6*d.* to the 1 dol.

† 1 dol. = 2*s.* 11*d.*

**Annex B.—RETURN of the Export Trade of Nagasaki for the
Years 1893–92.**

Articles.		1893.*		1892.*	
		Quantity.	Value.	Quantity.	Value.
			£		£
Tes—					
Green, basket-fired ...	Lbs. ...	507,946	5,946	262,291	2,884
Bancha and sundries ...	...	...	4,191	...	3,905
Rice ...	Tons ...	4,483	31,258	4,135	32,468
Coal ...	...	146,898	59,588	191,841	98,927
“ for ship’s use... ..	...	148,724	79,096	128,173	74,076
“ dust ...	...	86,809	39,806	98,362	48,050
Dried fish—					
Cuttle fish ...	Lbs. ...	3,771,479	59,798	3,071,360	50,046
Trico ...	...	268,389	8,134	227,563	8,712
Shell fish—					
Awabi ...	...	361,278	13,287	368,889	11,861
All others ...	...	...	7,985	...	5,320
Miscellaneous—					
Camphor ...	Lbs. ...	107,797	4,800	267,677	7,799
Charcoal ...	Tons ...	9,519	8,722	...	9,804
Grain, provisions, &c. ...	...	...	9,957	...	16,466
Flour ...	Lbs. ...	1,100,888	4,929	3,289,916	14,342
Mushrooms ...	...	237,638	11,346	243,764	12,466
Paper and books ...	...	...	7,084	...	3,607
Porcelain ...	...	...	8,000	...	8,007
Textile fabrics ...	...	...	14,186	...	11,285
Timber ...	...	...	7,573	...	7,791
Other articles ...	...	...	27,700	...	29,129
Total Japanese produce ...	...	...	400,351	...	472,608
Foreign produce and manu- facture ...	...	...	12,988	...	8,870
Grand total ...	...	...	413,339	...	481,478

* 1 dol. = 2s. 6½d.

† 1 dol. = 2s. 10½d.

**Annex 3.—RETURN showing Total Value of all Articles Exported
from and Imported into Nagasaki from and to Foreign
Countries during the Years 1893–92.**

Country.	Exports.		Imports.	
	1893.	1892.	1893.	1892.
	£	£	£	£
Great Britain—				
England	3,128	5,748	64,627	77,293
Australia	42	22	36	2
Canada	498	680	81	8
Hong Kong	103,424	126,981	90,717	95,635
India	9,883	11,728	25,007	9,878
United States	8,378	3,813	39,361	44,792
Germany	224	581	1,472	8,713
Russia	54,133	64,817	6,977	9,129
China	143,132	175,007	167,177	176,039
Corea	19,771	15,987	8,051	10,787
Other countries	478	8,854	64,295	5,966
Total	342,999	407,218	458,301	438,237
Ships’ use	79,349	74,262	...	...
Grand total	413,339	481,480	458,301	438,237

NAGASAKI.

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Annex 4.—RETURN of all the Shipping in the Consular District
of Nagasaki during the Year 1893.

ENTERED NAGASAKI HARBOUR.

Nationality.	Sailing.		Steam.		Total.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.
Japanese	2	1,074	250	304,258	252	305,332
British	17	10,649	188	390,876	205	401,525
German	3	2,527	145	118,478	148	121,005
Norwegian	...	...	39	27,622	39	27,622
Russian	...	...	48	56,853	48	56,853
American	1	62	15	35,784	16	35,846
Other countries ...	...	...	5	2,357	5	2,357
Total	23	14,312	690	936,228	713	950,540
„ for the year preceding ...	22	17,335	711	879,989	733	897,274

ENTERED KUCHINOTSU.

Nationality.	Sailing.		Steam.		Total.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.
Japanese	13	5,811	58	33,093	71	38,904
British	9	7,827	75	123,577	84	131,404
Dutch	...	...	12	8,063	12	8,063
German	2	1,035	19	11,694	21	12,729
Norwegian	...	...	29	40,818	29	40,818
Russian	...	...	1	678	1	678
American	6	5,051	...	...	6	5,051
Total	30	19,724	194	217,933	224	237,647
„ for the year preceding ...	24	12,713	141	164,957	165	177,670

ENTERED MOJI.

Nationality.	Sailing.		Steam.		Total.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.
Japanese	...	...	21	20,300	21	20,300
Austrian	...	...	13	30,500	13	30,500
British	2	728	226	383,276	228	384,004
German	...	...	56	40,930	56	40,930
Norwegian	...	...	20	14,834	20	14,834
Other countries ...	...	...	4	5,338	4	5,338
Total	2	728	340	495,178	342	495,906
„ for the year preceding ...	6	2,762	203	244,534	209	247,296

TOTAL for the Three Ports within the Consular District of
Nagasaki.

Description.	Sailing.		Steam.		Total.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.
Japanese	15	6,885	329	357,651	344	364,536
American	...	...	13	39,500	13	39,500
British	25	19,294	489	897,729	517	916,923
Dutch	...	...	12	...	12	8,063
German	5	3,562	220	174,102	225	174,664
Norwegian	...	...	88	83,274	88	83,274
Russian	...	...	49	87,531	49	87,531
American	7	5,113	15	35,784	22	40,897
Other countries ...	...	...	9	7,695	9	7,695
Total	55	34,764	1,224	1,649,329	1,279	1,684,093
.. for the year preceding ...	52	32,810	1,055	1,289,431	1,107	1,322,240

Annex 5.—RETURN of Foreign Residents and Firms in Nagasaki
on December 31, 1893.

Nationality.					Number of Residents.	Number of Firms.
British	..	..	..	..	87	5
American	..	..	..	..	54	4
Austro-Hungarian..	..	..	..	..	24	1
Belgian	..	..	..	..	2	..
Chinese	..	..	..	..	569	21
Danish	..	..	..	..	12	2
Dutch	..	..	..	..	4	..
French	..	..	..	..	54	4
German	..	..	..	..	20	3
Italian	..	..	..	..	2	..
Portuguese	..	..	..	..	7	..
Russian	..	..	..	..	73	2
Other nationalities	..	..	..	..	..	..
Total	..	..	..	..	908	42

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No. 1459.

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AND FINANCE.

JAPAN.

REPORT FOR THE YEAR 1893

ON THE

TRADE OF HIOGO AND OSAKA.

REFERENCE TO PREVIOUS REPORT, Annual Series No. 1260.

Presented to both Houses of Parliament by Command of Her Majesty,
AUGUST, 1894.

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JAPAN.

HIOGO AND OSAKA.

Mr. Fraser to the Earl of Kimberley.

My Lord, Tokio, May 18, 1894.
I HAVE the honour to forward herewith to your Lordship copy of the Hiogo and Osaka Trade Report for the year 1893, which has been drawn up by Mr. J. J. Enslie, Her Majesty's Consul for Hiogo and Osaka.

I have, &c.
(Signed) HUGH FRASER.

Report on the Trade of Hiogo and Osaka for the Year 1893.

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General
remarks.

The trade for the past year compares with that of 1892 as follows :—

				Value.		
				1893.	1892.	Difference.
				£	£	£
Imports				6,411,528	5,414,158	+ 997,370
Exports				3,316,861	3,223,831	+ 93,030
Total				9,728,389	8,637,989	+ 1,090,400

The following return in Mexican dollars taken from the Imperial customs returns, shows that the above gives an extremely erroneous idea of the trade of this district :—

				Value.		
				1893.	1892.	Difference.
				Dollars	Dollars.	Dollars.
Imports				47,755,021	36,220,175	+ 11,534,846
Exports				25,887,699	22,345,665	+ 3,542,034
Total				73,642,720	58,565,840	+ 15,076,880

With regard to the very great difference between the increase in the trade of 1893 over that of 1892, as shown in the sterling returns which accompany this report and are summarised above, and the returns made out in Mexican dollars, the cause is the same as that stated in the report for 1892.

It is entirely due to the fact that, under instructions, the sterling calculations for 1892 were:—Imports at 2s. 11½d.; exports at 2s. 10½d., whereas those for 1893 are: imports at 2s. 8½d., and exports at 2s. 6½d.

The opinion repeatedly expressed in former reports that for the purpose of a return of foreign trade Hiogo and Osaka must be considered one district, is supported by the fact not yet mentioned that the Hiogo and Osaka customs are under the control of one commissioner residing in the former city.

The following return conveys a very clear idea of the growth and present volume of trade and shipping in the Hiogo and Osaka district and that of Kanagawa (Yokohama):—

IMPORTS.

District.	Value.		
	1873.	1883.	1893.
	Dollars.	Dollars.	Dollars.
Hiogo and Osaka	6,310,212	8,255,327	47,755,021
Yokohama	19,635,768	18,844,810	36,284,426

EXPORTS.

District.	Value.		
	1873.	1883.	1893.
	Dollars.	Dollars.	Dollars.
Hiogo and Osaka	3,322,219	6,464,336	25,887,709
Yokohama	15,095,218	25,685,064	54,878,779

TOTAL FOREIGN TRADE.

District.	Value.		
	1873.	1883.	1893.
	Dollars.	Dollars.	Dollars.
Hiogo and Osaka	9,632,431	14,720,163	73,642,720
Yokohama	34,630,976	44,529,874	91,163,205

The foregoing discloses the following interesting facts:—

1. In 1883 the import trade of this district was 10,600,000 dol. less than that of Yokohama, whereas in the year under review it was 11,500,000 dol. in excess. In other words, the import trade here has during the last 10 years increased nearly sixfold. That in Yokohama is not quite double.

2. The export trade of Yokohama is, as stated on former occasions, necessarily largely in excess of that of this district, owing to powerful interests connected with the trade in silk and
(1806)

silk manufactures. However, notwithstanding those disadvantages, the export trade here has quadrupled since 1883; that of Yokohama is rather more than double what it was 10 years ago.

3. The total volume of trade here during 1893 has increased fivefold since 1883; that of Yokohama is rather more than double.

4. The value of silk and silk manufactures exported from Yokohama in 1893 was 39,000,000 dol. in excess of this district. Nevertheless the total foreign trade of Hiogo is only 17,500,000 dol. less than that of Yokohama.

The expansion of the general foreign trade of this district is thus shown to be far in excess of that of Yokohama, and there are ample signs to warrant the statement that the volume of business is bound to continue on the increase.

A comparison between the two districts as regards the volume of the entire foreign trade and shipping of Japan is of much interest. It is much facilitated by the following return of the total foreign trade, and of the total number and tonnage of foreign ships entering the various ports of the Empire during the undermentioned years:—

Year.			Total Foreign Trade of Japan.	Total Foreign Shipping of Japan (Entered).	
			Dollars.	Number.	Tons.
1873	..	.. ..	48,105,012	1,004	1,039,437
			Percentage.	Percentage.	Percentage.
		Hiogo and Osaka ..	20	27	27
		Yokohama	72	34	41
1883	..	.. ..	63,667,054	940	975,083
			Percentage.	Percentage.	Percentage.
		Hiogo and Osaka ..	22	18	21
		Yokohama	70	31	43
1893	..	.. ..	177,137,643	2,213	3,498,359
			Percentage.	Percentage.	Percentage.
		Hiogo and Osaka ..	42	34	34
		Yokohama	51	21	25

The two foregoing sets of returns speak volumes to the steady and remarkable expansion of trade and shipping in this district.

Twenty years ago the foreign trade of Japan was not quite 50,000,000 dol., of which this district did only one-fifth. Last year the local business was nearly one-half of the entire trade of this Empire, amounting to 177,000,000 d l.

Though increased in volume and largely in excess of 1892, Trade the foreign trade of this district has not been remunerative to generally. foreigners. By this I mean that there has been in most cases the merest margin for profit, and that has not infrequently disappeared by reason of the highly unsatisfactory state of the money market.

A few, who were in a position to avail themselves of what the result proved to be the advantages attaching to forward settlements, did well, but the majority have had to console themselves with the hopes of better days.

The condition of things brought about by what some term the appreciation of gold, others the depreciation of silver, and the incalculable harm being constantly and in a growing manner inflicted on English industries and shipping, is aptly described in the following extract from a circular letter issued by the Shanghai branch of the China Association. This letter, be it observed, also disposes of the fallacious notion that the trade of India is of more importance to Great Britain than the trade of the far East; the total India trade for 1891 was 110,000,000*l.*, that for the far East 130,000,000*l.*

"The medium of exchange in these countries is silver employed in the shape of coin, as rupees and dollars, or as bullion; its purchasing power in these countries having throughout the period of gold appreciation remained practically unchanged.

"When by means referred to silver was maintained at a reasonable ratio with the gold currency of the West foreign commerce flourished and gave promise of enormous extension. When the tie between the metals was dissolved that commerce became disorganised; each year has seen greater difficulties; and at the present time the position has become intolerable.

"The appreciation of gold means that every article of commerce produced in England must fall in gold and rise in silver price: it is manifest that to this there must be a limit; and it is not unreasonable to conclude that the limit is now reached. The manufactures and products of West and East continue in themselves practically unchanged: the cause of the trouble which now threatens this commerce with virtual extinction is not in the nature of the commerce itself, but in the medium in which it is conducted.

"If the money of the East continues to be discredited, and the ounce weight of silver which formerly was the equivalent of one-fourth of a pound sterling has now fallen to be one-eighth of a pound sterling, and may decline still further, the export trade from gold to silver-using countries becomes a practical impossibility, and the hundreds of millions people who have hitherto been consumers of English manufactures and products will find it distinctly to their interest and benefit to manufacture or produce for themselves to enable them to dispense with the use of commodities they have heretofore found advantage in importing from the manufacturing nations of the West.

"When once Eastern nations begin to invest in manufactures (1806)

English industries will be confronted with powerful, and it may well be invincible competitors. Not only will the mills, workshops, and mines of England suffer, but the decline of exportation to the East will deprive millions of tons of shipping of occupation, and the capital value represented by these great interests must inevitably suffer enormous depreciation."

One phase of English industries with regard to the far East, inevitable but intensely interesting, and of the most vital importance is, that for some years past, the importers of the manufactured articles and those of the manufacturing machinery have been competing, side by side, much to the steadily increasing detriment of the former. This reference is, of course, meant to apply to cotton yarn and cotton spinning machinery.

Speaking generally, however, it is a healthy sign and a proof of considerable circumspection that in these parts there have been no accessions to the "great majority" of the commercial world.

Some reference was made in last year's report to the advantages which foreign competitors enjoy by their use of the decimal and metric systems, and it was then stated that the remarks applied with much force to the Japan trade.

The following extract from a leading London journal shows that the general question is receiving some intelligent attention:—

"Now that the United States have adopted the metre and the kilogram as their standards of length and weight, in conformity with Continental practice, England can hardly afford to stand out in the cold much longer. The Americans have not gone so far as to abolish the anomalous yard and pound, but from the 5th instant they are to be considered as derivatives of the decimal standards. This concession will give their engineers and manufacturers an opportunity, which ours have long ceased to enjoy, of competing on equal terms for foreign work with the firms of all the nations belonging to the metrical union, and marks a most important step towards obtaining a complete universality of weights and measures."

These are weighty words, deserving of most careful consideration.

Imports.

Though the import trade shows an increase in volume of 997,370*l.* (11,534,846 *dol.*) according to the currency of this Empire, it has been most seriously affected by the fluctuations in exchange and the steady fall in silver; it stands to reason that business is more than ordinarily anxious work, when the importer finds he has to take up his bills at a rate several pennies lower than that ruling when the order was sent.

Wise heads may have done much to stave off disaster, but the profits, if any, have been phenomenally small.

In his annual report on the trade of Kobe for 1893, the Chairman of the General Chamber of Commerce for Hiogo and Osaka said that all branches of the import trade had suffered more or less from a falling exchange, and that the evil effects had been most severely felt in the case of articles of high cost and

superior quality. It, however, appeared to him that there would probably be a corresponding increase in the demand for cheaper manufactures and for raw materials, which might compensate for the decrease in other directions.

Generally speaking, he said, the position as regards stocks is at present more satisfactory than it has been for some years past, and that if importers continue to act with some amount of caution, there is a prospect of a fairly steady and a moderately remunerative business.

The increase in imports occurs principally in the following articles :—

Articles.				Quantity.	Value.
					£
Cotton manufactures—					
Handkerchiefs	..	Dozen	..	3,881	..
Thread	..	Lbs.	..	20,877	..
Cotton piece-goods—					
Chintzes	..	Yards.	..	52,724	..
Satins	..	"	..	1,602,605	..
Shirtings	..	"	..	1,979,467	..
T-cloths	..	"	..	826,627	..
Victoria lawns	..	"	..	351,205	..
Cotton, raw	..	Lbs.	..	18,348,784	..
Woollen manufactures—					
Blankets	..	"	..	217,362	..
Cloth	..	Yards	..	98,781	..
Flannel	..	"	..	405,351	..
Italian cloth	..	"	..	147,966	..
Mousseline de laine	..	"	..	85,163	..
Wool	..	Lbs.	..	375,651	..
Yarn	..	"	..	40,349	..
Metals—					
Iron, pig	..	Tons	..	5,179	..
" plate	..	"	..	604	..
" rail	..	"	..	9,903	..
Zinc	..	"	..	633	..
Kerosene	..	Gallons	..	12,902,748	..
Rice	..	Tons	..	19,180	..
Sugar	..	"	..	4,938	..
Miscellaneous	..	..	..	..	392,338

The decrease in imports occurs principally in the following articles :—

Articles.				Quantity.
Cotton manufactures—				
Yarn	..	Lbs.	..	7,455,324
Cotton piece-goods—				
Turkey-reds	..	Yards	..	255,057
Velvets	..	"	..	209,753
Cotton (unginned)	..	Lbs.	..	15,318,136
Metals—				
Iron, bar.	..	Tons	..	1,296
" nail	..	"	..	190
Lead	..	"	..	1,407

Cotton yarn
(English).

As the inevitable result of the increase in the cotton spinning industry, the importation of cotton yarn generally, and English more particularly, has fallen off; formerly there was an all round demand for yarn, now sales are restricted to the highest counts.

The following return gives a succinct idea of the course of business during 1893:—

a Nature of Business.	
COUNTS.	
16-24	Very little
28-32	Fair amount
38-42	Nothing
2/32	Very little
2/42	Considerable
GASSED YARNS.	
2/60	Large
2/80	Large
2/100	Very limited

Success in the manufacture of the finer counts of yarn depends very much on climatic influences. India appears to be adversely affected by them, and such is also said to be the case with Japan.

This country has, however, immense advantages—machinery of the best and latest kind, and a plentiful supply of cheap labour, extremely cheap fuel, no factory regulations such as those meeting the English manufacturer on all sides (if a hand chooses and is able to work 12 to 14 hours there is nobody to say nay).

There is, moreover, little fear of serious strikes, though this kind of forcible argument is becoming part of the new state of things, the extremely reprehensible phase of strikes, interference with those desirous of working, is thus far unknown here.

As regards cost of production, the "Singapore Free Press," quoting from the "Economiste Français," says that with exchange at 195 rs. per 100 dol., the cost of manufacturing a pound avoirdupois of yarn in India is 5 sen 2 rin 1 mo, or about 1½d., while the cost in Japan is only 3 sen 0 rin 6 mo, or about ¾d. If such a great difference exists between the cost in India, how much greater must it be with regard to England, where wages are so much higher.

Commenting on this, the "Free Press" says:—"We wonder if the millions engaged in the Manchester trade will realise their position while there is still time. If something is not done at once the opportunity will be lost. Let Japanese goods once become established in the various silver-using markets, and it will take years of keen competition to dislodge them. Week after week we learn from Japanese papers that new machinery has been ordered, and that, it must be remembered, of the very latest

design. When the factories are all in working order the majority of them will have machinery that probably is unequalled by any in the world."

A brisk demand sprung up with the opening days of the year, Indian cotton transactions being heavy, with a good advance on values, but yarn. towards the end of January the enhanced cost of importation brought business more or less to a standstill for some months, during which dealers were content to rest on their laurels, gradually disposing of their holdings at large profits.

Towards the end of February lower prices ruling in Bombay adversely affected values here, and a very slow market followed up to the end of May. During the interval prices fell from 5 dol. to 7 dol. per bale, according to count of spinning.

During June a temporary reaction took place, but very little was done beyond clearing the market of all "spot" goods at prices below cost of importation.

The result of the half-year's trading to importers was unsatisfactory, but it was extremely profitable to dealers and distributors.

On June 27 the unprecedented fall in rupee exchange was brought about by the action of the Government of India in closing their mints to free coinage and in endeavouring to uphold the sterling value of the rupee, the immediate effect being to entirely disorganise exchange and render all attempts at business in imports from India futile.

Among the enclosures in this report will be found a return Table VIII. showing the course of exchange on India during the past year; its interesting feature is the rise, temporarily no doubt, in the value of the rupee.

Throughout July the only business done in Indian yarns was in "spot" goods, which importers were willing to realise under cost, and during the month many unexecuted orders were cancelled. In August dealers appeared to grasp the situation, seeing clearly that there was no prospect of an early return to the "status quo ante," and entered the market with a fair amount of spirit; the result was a brisk demand up to the end of September.

The cost of importation now advanced, and little or no business has been done since then.

It is peculiar to note that the bulk of the goods purchased during August and September were, on arrival, re-shipped on Japanese account to Shanghai, where they realised better returns than if disposed of on the spot.

The result of the second half-year's trading must be considered as equally unsatisfactory as the first.

As in the case of English yarn, so also has the importation of Bombay yarn fallen off. This will be seen by the following return:—

Year.						Amount.
						Bales (of 400 lbs.).
1877..	..	..	..	..	..	142
1880..	..	..	..	..	..	4,527
1883..	..	..	..	..	..	17,421
1889..	..	..	..	..	..	62,220
1890..	..	..	..	..	..	37,722
1893..	..	..	..	..	..	14,198

Cotton.

Owing to the demand created by the numerous cotton spinning mills in this country, the business in this staple is naturally on the increase. Ten years ago the quantity imported was small, and only amounted to 2,808,348 lbs. for the whole of Japan, whereas the amount passed in 1893 through the customs of this district alone was 99,321,835 lbs., nearly 19,000,000 lbs. in excess of the previous year.

In unginned cotton, on the other hand, there is a decrease of 15,300,000 lbs.

The accompanying return, comparing the total amount of raw cotton with that of cotton yarn imported into Japan in 1883 and 1893, and showing the percentage in various consular districts, is of interest.

In the case of both staples the bulk of the business centres in this district.

TABLE showing Quantity and Value of Raw Cotton Imported into Japan during the undermentioned Years.

Year.						Quantity	Value.
						Lbs.	Dollars.
1883	..	..	..	..	..	2,808,348	247,506
1893	..	..	..	..	..	164,442,368	16,161,670

Of the above—

District.						1883.	1893
						Per cent	Per cent.
To Hiogo and Osaka	..	..	..	..	..	16	83
Yokohama	..	..	..	..	..	57	11
Nagasaki	..	..	..	..	..	27	6

TABLE showing Quantity and Value of Cotton Yarn Imported into Japan during the undermentioned Years.

Year.					Quantity.	Value.
					Lbs.	Dollars.
1883	..	..	..	..	32,854,166	6,164,721
1893	..	..	..	..	25,873,536	7,284,243

Of the above—

District.					1883.	1893.
					Per cent.	Per cent.
To Hiogo and Osaka	..	..	..	..	29	54
Yokohama	..	..	..	..	70	46
Nagasaki	..	..	..	..	1	..

The following notes on the leading industry of Japan show, to some extent, what effect the new departure, fully justified by steadily increasing requirements, is having on the cotton and cotton yarn trade, not only with Japan, but with the far East generally.

A leading Japanese newspaper gives a glowing account of the present prosperous condition of the cotton spinning companies. It furnishes the following estimates regarding a bale of No. 20 yarn of left twist, selling in the market at 92 dol. :—

Cotton-spinning industry in Japan.

					Prices.
					Dollars.
Price of middling Bombay cotton	..	..	..	..	54
Cost of spinning	..	..	..	..	10
Allowance for waste, &c.	..	..	..	..	8
Balance—profit	..	..	..	..	20

In support of this statement it is merely necessary to call attention to the following return of dividends paid by some of the companies in Osaka :—

					Per Cent.
Osaka Cotton Spinning Company	(over)				10
Naniwa	23	23	..	..	12½
Temma	23	23	..	..	10
Hirano	23	23	..	..	20
Senshu	23	23	..	..	20
Amagasaki	23	23	..	..	10½

The following return, taken from a local Japanese newspaper, shows the profit accruing to cotton mills during the second half of the year under review for every spindle worked (the Japanese yen is the equivalent of 1 Mexican dollar):—

Company.					Amount.	
					Yen	sen.
Osaka Boseki	..	..	..	..	3	38.5
Naniwa	"	..	..	..	2	26.2
Hirano	"	..	..	..	5	80.4
Settsu	"	..	..	..	5	35.4
Temma	"	..	..	..	2	89.7
Sensu	"	..	..	..	3	11.6
Kuwabara Boseki	..	..	..	..	1	10.9
Amasaki	"	..	..	..	4	93.1
Himeji	"	..	..	..	3	50.8
Okayama	"	..	..	..	4	35.0
Tamashima	"	..	..	..	3	73.4
Kanegafuchi	"	..	..	..	2	92.9
Tokyo	"	..	..	..	4	96.1
Owari	"	..	..	..	4	12.0
Miye	"	..	..	..	4	12.2
Kurume	"	..	..	..	4	03.4
Miike	"	..	..	..	1	52.8
Wakayama	"	..	..	..	5	63.0
Uwa	"	..	..	..	2	67.7

These figures show the prosperity of the cotton spinning industry in Japan and call for no comment; much confidence is expressed with regard to still larger profits during the ensuing 6 months, as the demand is generally in excess of the supply.

Various opinions have been ventilated as to the effect of the gold and silver question on this new branch of Japanese industry, and on this subject a leading journal in this Empire has the following:—

"The fears that the fall of silver would tend to raise quotations for cotton yarn and thus decrease the profits of spinning mills are quite unfounded, the yarn manufactured by the various mills being principally No. 16, which is made from Chinese cotton. On the contrary, the fall of silver has increased profits from the fact that native yarn has advanced in sympathy with the rise in foreign yarn; while the decline of silver has considerably obstructed the import of yarn. The cotton for the manufacture of No. 16 yarn by the Kanegafuchi Spinning Mill is quoted at 17.50 yen to 18 yen per bale. At the former rate the quotation for 350 catties, which would be required for the manufacture of one bale of yarn would be 61.35 yen. If we add 9 yen, the expenses of manufacture, it will bring the cost up to 70.25 yen, which shows a profit of 17.75 yen per bale, at the present quotation of 88 yen per bale. Even in the spinning of No. 32 yarn, which requires American cotton a profit of 20.40 yen is obtained at the current price of 122 yen per bale. As it takes twice as long to manufacture No. 32 as it does to make No. 16, and there is a much greater demand

for the latter, No. 16 is the yarn principally made at the mills. Other mills obtain like profits, all of which may be set down to the decline in silver."

The Japanese Press have again on various occasions been drawing attention to the obstacles at present existing, as is alleged, to Japanese spinners securing a definite hold on the Chinese markets for their yarns.

Japanese yarns have, it is said, already gained a very favourable reputation in China, where they are spoken of as being even superior to those from Bombay, attributable, as mentioned in a former report, to the heavy hydraulic pressure to which Bombay yarn is submitted in packing; this makes the article hard and increases the expense in dyeing.

The Japanese are anxious to impress the Chinese with the superiority of their goods, and so pave the way toward a greater development of the trade in the near future; it is said, however, that at present they are doing so at a loss.

A short time ago an order was received from Shanghai by a certain company to send over a specific amount of yarn at the rates of 85 dol. per 100 packages of No. 16, and 83 dol. for No. 14. These prices are only 1 dol. or 2 dol. above those ruling in the Japanese market, and when export duty at 4 dol. freight and other minor charges are added there is a loss.

At present, therefore, the export of yarn to China is unprofitable, and there is a clamour on the part of manufacturers for the abolition of import duty on raw cotton (strongly objected to by the Japanese producers of cotton) and of export duty on yarn.

The Government is strongly urged to remove all duties in connection with the spinning industry, and so assist the nation in the endeavour to secure the enormous markets of China.

A new, and not unimportant, feature in this part of the trade of Japan, is the combination entered into between the Cotton Spinners' Union and the Japanese Mail Steamship Company for the purpose of carrying on the cotton trade with Bombay.

The rate of freight from Bombay to this port has, up to the time when the combination was started, been 17 rs. per ton.

Under the arrangement drawn up between the parties referred to, and which came into force on November 1 last, freight has been fixed at 13 rs., but it is stipulated that if owing to competition the rate has to be lowered, the steamer company is to be indemnified with regard to any necessary reduction on a guaranteed quantity of 50,000 bales per annum. The penalty attaching to cotton imported by ships other than those of the Japanese company was fixed at 1 dol. 50 c. per bale, or 6 dol. per ton.

A war of rates is now taking place, and the penalty referred to has been doubled.

It stands to reason that this state of things has, to some extent, affected business, and it is impossible at present to say what it will result in.

Judging by the apathy and indifference of many the question might almost impress one as being a combination which has no

elements of permanency; be this as it may, there is much at present not generally known, more particularly certain considerations which have moved a wealthy Indian firm to join the movement, and lend it invaluable aid.

The struggle which has commenced between the opposing companies can hardly be a cause for congratulation, for, in wars between capitalists, as in contests between capital and labour, both sides have invariably to pay very dearly. Meanwhile, it is an ill wind that blows nobody any good, and if for a time merchandise is carried at nominal rates, there may be those who will reap an advantage.

The ostensible object of the movement is a reduction in freights: the moving spirits are consumers of raw cotton, the Japan Mail Steamship Company and a small, if not select, band of patriots.

Quoting from one of the leading foreign newspapers published in China, it may be said to be in some sense to be a leaf taken out of the shipowners' conference book, which aimed at increasing freights all round.

It is currently reported that at the meeting of the Cotton Spinners' Union held at Osaka in February last, it was decided to continue the contract with the Japan Mail Steamship Company for another year, all cotton for Japanese consignees imported from Bombay to be shipped by that company's steamers and those running in connection with the Union.

Table IX.

I enclose a list of the cotton spinning companies in Japan on June 30 last, and append translation which appeared some time ago in the "Japan Mail" of a visit to the Kanegafuchi Mills, furnished to a leading Japanese journal; it contains interesting details which apply to many of the more important companies.

The machines of this mill are kept at work day and night without intermission.

"The aggregate number of spindles is over 30,500, with a producing capacity of about 23,000 catties per 24 hours; the number of men employed is a little over 2,100 and the number of women 3,700, regularly working for 12 hours, out of which 40 minutes are allowed for meals and 15 minutes for change of dress at the close of the day's work. This is not the only factory, of course, where the machines are kept going day and night. In all the spinning factories throughout the Empire a similar method is pursued. At the Kanegafuchi Mills, the labourers, women included, take turns of night labour every week. The wages for women range between 4½ and 19 sen per day, the majority receiving 8 sen. The factory has a building for girls who desire to live in the compound. The boarding expenses are 2 sen per meal. It has also a place set apart for sick people, where they are attended gratis by physicians in the service of the company. Patients are required, however, to pay for the medicines they receive, but they have the advantage of being allowed to defray the costs by instalments out of what they earn.

The company has also a savings system for its employés, and it enforces saving within certain limits. Thus out of a monthly stipend of from 2 to 3 yen, 5 sen at least must be set aside, and in the case of salaries above that figure the rate is 5 sen in every yen. An employé is not entitled to receive the money thus saved, except on leaving the company's service or in the event of falling sick. There is, further, a system of voluntary saving, interest at the rate of 10 per cent. being allowed on all money put aside under this arrangement. This latter method was inaugurated in the spring of 1892, and already a sum of over 1,800 yen has been saved under it, the largest amount standing to the credit of any one person being 57.40 yen."

Owing to the drop in exchange there was, during the second half of the year under review, a great decline in the volume of imports, the redeeming feature being that at the close of the year stocks were comparatively small. Cottons and woollens.

Cottons, generally speaking, have not been remunerative, though there has been a considerable increase in the importation of T-cloths, Turkey-reds and cambrics, and some increase in grey shirtings.

It appears that the importation of T-cloths is likely to be seriously affected by the local manufactures of the Osaka Cotton Spinning Company, doing business on a large scale. In the province of Kû this industry has also been started.

It is stated that Japanese T-cloths can be sold 0.20 dol. less per piece than the foreign article; the present prices of the three grades vary from 1 dol. 40 c. to 1 dol. 60 c.

Woollens were indifferent, cloth being bad, and flannels, mostly of German manufacture, particularly so; blankets, on the other hand, have been good, but were imported in quantities far in excess of the capacity of the market. Woollens.

The tables accompanying this report, compiled as already stated under instructions in pounds sterling, show an increase of 72,440*l.* in this branch of the trade; as a matter of fact the increase, as shown in the official statistics compiled by the Imperial customs, is only 83,765 dol. Metals

During the first half of 1893 a steady current business was done in all descriptions of metals, prices varying only very slightly during that interval, and the market in general presenting no features of special interest.

In the second half, however, a gradual improvement took place, prices rising all round as sterling exchange fell, and at the close of the year the advance amounted to about 10 to 15 per cent. for bars and plate iron, and 25 per cent. for pig, in which latter article the business of the district shows a large increase, owing in part to heavy importations for Government use.

Manufactured iron can still be imported from Antwerp at lower prices than from British ports, and although of generally inferior quality, it finds ready sale. Redcar No. 3 remains the standard brand of pig iron.

Wire nails have shown less improvement in prices than other B
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metals, and at the same time a slight falling-off in the arrivals as compared with 1892, but the trade in this branch continues to be a very important one, and is still supplied almost entirely from Germany, there being no manufactories in this country.

Sheet zinc finds a large and increasing demand, being indispensable as lining for cases containing matches for export; an advance in the price of this article occurred in sympathy with the decline in silver.

As a rule, the business in metals became, on the part of Japanese merchants, more of a speculation in exchange than ever before, and those who had contracted "to arrive" at a price in silver, were able, as rates fell, to undersell their competitors, who, hoping for a rise in sterling, had bought goods afloat on a gold basis.

The natural result of such a condition of affairs was to reduce business to a very unsatisfactory state, both for the Japanese and foreign merchants, there being no real basis of prices to rely on, and values changing almost daily to meet the altered rates for bank paper on London, by which the cost of all imports is regulated.

The question whether or not Japan is to become self-supplying in the matter of iron possesses very great interest, and the following summarised translation appearing in a local foreign journal of a speech delivered by Mr. Wada, ex-Director of the Mining Bureau, at a meeting of the Geographical Society on January 25 last, bears on this point:—

"Mr. Wada maintained that Japan is emphatically rich in iron ore. Recent investigations by Mr. Kuwabara have proved that China possesses ample stores of the valuable mineral, and it was already known that Korea and Russian Siberia are similarly fortunate. It might have been inferred that the same was true of Japan; and Mr. Wada says that there never would have been any doubt of the fact had not the deposits been deep below the surface, and had not the ore differed in quality from that of England, France, and Germany. In short, engineers have been greatly deceived, as they ought not to have been had they taken due note of the deflections of the magnet. Almost everywhere throughout Japan, iron is found imbedded in granite and calcareous rocks. The total supply visible at Kamaishi in Rikuzen, Sennin-zan in Akita, and Akatami-zan in Echigo is over 30,000,000 tons, and fresh discoveries of ore are of daily occurrence. On the other hand, Japan's annual consumption of iron is from 80,000 tons to 130,000 tons, and her needs must greatly increase for military, naval, and railway purposes. It is true that the attempts made by the Government in former years to establish iron-smelting works at Kamaishi were a failure, but the causes are to be sought, not in any natural difficulty, but in the facts that the enterprise was premature, and that the magnitude of its inception was out of proportion to the locality. The remoteness of the place entailed heavy expense on account of transport. In those days it cost 4.48 yen to carry a ton of metal from the works

to Tokyo, whereas the same transport can now be effected for 1.80 yen. Coal for smelting, also, could not then be obtained under 14 yen per ton, while now it is procurable for less than 5 yen, delivered at the works. That the enterprise can be made profitable under proper management is demonstrated by the experience of Mr. Tanaka, whose foundry, placed at the very spot where the Government's works were, flourishes well. He is not provided with first class engineers or other experts, yet his opportunities are such that a ton of iron costing only 14 yen before shipment at Kamaishi sells in Tokyo for 22 yen to 23 yen."

The year opened with only 15,000 cases in stock, but large ^{Kerosene.} cargoes arrived during January; a lot of 5,000 cases of Atlantic "spot" brought 1 dol. 87 c., the highest price recorded for 2 years.

In consequence of this, holders refused to sell under 1 dol. 78 c. to 1 dol. 86 c.; and the market closed firm.

Following on this there were considerable settlements of American, and shortly after the tank steamer "Couch" brought 4,200 tons (about 150,000 cases) of Russian, selling at 14 c. per gallon in second hand tins.

After a drop in prices, rates went up in May, there being a further rise in July. Strong and advancing in August, the market weakened for a time, but improved in November, Atlantic fetching 1 dol. 85 c., Russian case oil, 1 dol. 70 c. per case, and tank oil, 14.3 c. per gallon.

The year closed weak. A considerable local business is done by Japanese, who purchase low classed and damaged oil, both American and Russian, refine it up to 150 degrees test, and sell it at a fair profit.

Returns showing the deliveries of kerosene in this district ^{Table VI.} during 1891-93, those in Yokohama for 1892-93, and the average market for this district during 1891-93, accompanying this ^{Table VII.} report.

When stating that about 60 per cent. of the sugar refined in ^{Sugar.} the Hong-Kong factories comes to this country, and that the demand is increasing, the tendency of this portion of the import trade of the district seems amply explained.

The growing demand for refined sugar is a feature of modern Japan, as in former days people were quite satisfied with the brown kind.

There continues to be a steady and increasing demand for ^{Chemicals.} chemicals used in match making.

The business in these articles is, generally speaking, on the ^{Watches and} decrease, and Japanese are competing strongly with the foreign ^{clocks.} article as regards clocks.

Numerous small factories at present turn out clocks of the cheaper kind, which cost less than those made in foreign countries. Movements are largely imported, put together and encased in Japan; in many instances the entire article is made on the spot.

The importation of this article has been steadily increasing for ^{Alcohol.} some years past; for the whole of Japan it only amounted to (1806)

1,698 dol. in 1885, whereas in 1893 the quantity imported was valued at 379,470 dol.

It is extensively used for fortifying and adulterating "sakè" (Japanese wine).

The adulteration is mainly restricted to the cheaper kinds of "sakè," which, even under those conditions are far less injurious to health than the vile rubbish frequently sold throughout the country as foreign wines and spirits.

The significance of this statement will be understood after a perusal of the following circular from Europe, very widely distributed by post throughout the far East.

"Gentlemen,

November, 1893.

"We beg to give you our to-day's quotations for the Eastern markets, viz.:—

	Under Proof.	Per Case (12 bottles, 22-oz.).		Per Case (24 bottles, 11-oz.).	
		Plain.	Wired.	Plain.	Wired.
		s. d.	s. d.	s. d.	s. d.
Brandy	50	3 4	3 10	4 10	5 8
"	36	3 8	4 2	5 2	6 0
"	25	4 0	4 6	5 6	6 4
Whiskey, old tom {	50	3 6	4 0	5 0	5 10
gin, rum	25	4 4	4 10	5 10	6 8

	Under Proof.	Per Case of—	Prices.
			s. d.
Gin.. .. .	25	12 bottles, 2 imperial gallons..	2 7½
"	25	15 " 4 " ..	5 2
"	25	15 " 5 " ..	6 1
Vermouth, French	..	12 " 1 litre each ..	4 6
"	..	24 " ½ " ..	5 6
" Italian	..	12 " 1 " ..	6 0
"	..	24 " ½ " ..	7 0
Port, sherry " ..	..	12 " (quarts)	4 6
"	..	24 " (pints)	5 6

free on board at : cash payment.

"Prices are variable.

"We are, Gentlemen,

"Your's faithfully,

"_____."

A copy of this circular continues in my possession, but for the present the name of the firm and its place of business are not given.

Having touched on the question of "sakè" brewing, I may state that an attempt is to be made to secure an outlet for it

abroad, the idea being that it is a suitable beverage for labourers in cold countries. The "Saké" Manufacturers' Association have taken up the suggestion in earnest, and Japanese journals state that a committee is now in Tokio compiling statistics regarding the liquor trade in foreign countries.

The importation of beer has steadily declined for some years past, and among various other reasons is the rapidly increasing brewing industry in Japan.

Several companies have for some years past produced an excellent, light kind of beer, which has almost entirely supplanted the well-known stock beer, at one time exceedingly popular throughout the Empire.

The best known kinds of Japan brewed beer are the Asaki, the Ebisu, and the Kirin beer.

At no time has there been any special demand among Japanese for English brewed beer.

Exports.

The gold and silver question has also had an injurious effect on the export trade, but a definite opinion as to the result of last year's business cannot be, at present, expressed.

Direct export to foreign countries has frequently been tried by enterprising Japanese, but has, as a general rule, been eminently unsatisfactory.

Quite recently one of the leading Japanese newspapers made a statement to the effect that a prominent firm had in this manner lost 130,000 dol. in transactions for 1893, and that an additional sum of 400,000 dol. was owing by firms who, at any rate at present, are unable to pay.

It might be in their interest if Japanese bore in mind the truth of the saying that "all is not gold that glitters." To them the general surroundings of foreign merchants may seem to denote prosperity; although in some very exceptional instances such may be the case, the large majority of business houses are, at present, most certainly not amassing fortunes but hoping, almost against hope, that the future may be more propitious.

One all-important phase of this question, not to be lost sight of, is that foreign merchants take upon themselves the entire risks of the trade.

It has been very correctly stated elsewhere that "as a matter of sentiment it might be very agreeable that whatever part of Japan's trade is carried on within her own borders should be in Japanese hands. But from the point of view of practical advantage it would be impossible to find any better agents than the foreign merchants at the open ports.

* * * * *

"It is owing to the operation of such a uniquely advantageous agency that, within the short space of 30 years there has been
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built up a commerce which puts tens of millions annually into the pockets of the people."

The increase in exports occurs principally in the following articles:—

Articles.				Quantity.	
Rice	..	..	..	Tons	3,768
Metals—					
Antimony	..	..	..	"	84
Bronze	..	..	..	"	147
Fans	..	..	..	Number	4,967,761
Matches	..	..	..	Gross	4,085,268
Straw plaits	..	..	..	Bundles	199,710
Umbrellas	..	..	..	Number	851,493
Wax (vegetable)	..	..	..	Tons	444

The decrease in exports occurs principally in the following articles:—

Articles.				Quantity.	
Tea	..	..	..	Lbs.	1,902,795
Brass wire	..	..	..	Tons	61
Copper, bars and slabs	..	..	..	"	835
" ingots	..	..	..	"	400
Coal	..	..	..	"	5,812
Camphor	..	..	..	"	287
" oil	..	..	..	"	152
Rags	..	..	..	"	280
Rapeseed	..	..	..	"	1,626
Seaweed	..	..	..	"	1,769

Rice.

The result of the year's trading shows an excess over 1892 of 3,768 tons exported; the customs returns, however, show a decrease in value of 33,687 dol., and in the sterling tables accompanying this report the decrease figures at 63,396l.

The average price of rice was higher in 1893 than in 1892.

The curious anomaly that, while the quantity of rice exported in 1893 is considerably in excess of that for 1892, values are much in favour of the latter year, is easily explained.

The export of rice being duty free, there is a marked absence of accuracy in the returns of values sent in to the custom-house.

The very large excess in the sterling value for 1892 over that for 1893 is due to instructions as to exchange calculations already referred to.

The average price of rice during the undermentioned years was as follows:—

QUALITIES of Rice.

Year.	Per Koku (5·13 Bushels) of Uncleaned Rice.		
	Best.	Medium.	Inferior.
	Yen.	Yen.	Yen.
1891	7·303	7·040	6·842
1892	6·985	6·579	6·246
1893	7·374	6·964	6·701

The following statistics, for the whole of Japan, of fluctuations in the price of rice and of the yield, export and import of rice, &c., are based on investigations made by the Imperial authorities.

The quantities represent “koku”; the price, that ruling on the market in Tokio.

Year.	Meiji.	Price of Rice per Koku.	Value compared with Current Money.		Price of Rice Estimated in Gold.	Price of Rice Estimated in Silver.
			Gold Coin.	Silver Coin.		
		Yen.	Yen.	Yen.	Yen.	Yen.
1868	1	6·378	...	0·748	6·665	8·527
	2	8·795	...	0·962	9·191	9·142
	3	8·898	...	1·033	9·298	8·614
	4	5·608	...	0·978	5·756	5·632
	5	3·731	...	1·018	3·899	3·665
	6	4·542	0·999	1·036	4·547	4·384
	7	6·961	1·004	1·038	6·933	6·706
	8	6·874	1·008	1·029	6·819	6·680
	9	4·882	1·019	0·988	4·791	4·936
	10	5·150	1·040	1·033	4·952	4·985
	11	6·200	1·158	1·099	5·354	5·641
	12	8·210	1·339	1·212	6·181	6·774
	13	10·180	1·573	1·477	6·440	6·358
	14	10·485	1·843	1·696	5·699	6·182
	15	8·755	1·690	1·571	5·180	5·573
	16	6·075	1·394	1·264	4·358	4·806
	17	5·370	1·198	1·089	4·482	4·931
	18	6·900	1·218	1·055	5·665	6·540
	19	6·160	1·246	1·000	4·944	6·160
	20	5·416	1·296	1·000	4·179	5·416
	21	4·931	1·329	1·000	3·710	4·931
	22	6·277	1·312	1·000	4·861	6·377
	23	8·897	1·204	1·000	7·390	8·897
	24	7·065	1·263	1·000	5·695	7·065
	25	7·338	1·409	1·000	5·208	7·338
1893	26 (to June)	6·986	1·502	1·000	4·651	6·986

YIELD, Export and Import of Rice, &c.

Year.	Meiji.	Rice.			Mugi (Wheat, Barley). Yield.
		Yield.	Export.	Import.	
1868	1	...	...	83,909	...
	2	...	...	648,286	...
	3	...	...	2,180,843	...
	4	...	...	167,832	...
	5	...	...	...	...
	6	...	65,805	7,637	...
	7	25,908,920	55,842	4,701	9,868,330
	8	26,458,236	2,173	4,096	10,497,808
	9	24,743,790	187,801	96	8,896,072
	10	25,587,955	416,884	46	9,620,499
	11	25,292,540	799,169	9	9,411,460
	12	32,418,924	84,359	49,994	9,890,908
	13	31,359,325	27,280	79,821	12,503,063
	14	29,971,863	42,624	21,667	10,507,983
	15	30,692,327	280,390	2,868	12,938,752
	16	30,671,492	174,161	17	11,763,446
	17	26,349,883	454,824	2,841	13,105,841
	18	34,186,169	127,112	118,896	11,935,467
	19	37,191,424	555,153	3,926	16,033,950
	20	39,999,199	367,287	28,095	16,923,144
	21	38,645,583	1,325,353	4,871	15,291,658
	22	33,007,566	1,310,852	20,695	15,355,158
	23	43,087,809	153,917	1,838,638	10,712,955
	24	38,123,548	799,440	671,203	18,078,373
	25	41,378,956	486,666	829,724	15,941,276
1898	26 (to June)	...	507,118	185,323	16,650,275

The following is a return of the rice mills in this Empire, based on enquiries made by the Hiogo Rice Export Merchants' Guild:—

Districts.	Factory.	Production per 24 Hours.
		Tons.
Yokkaichi, Ise	Yokkaichi Seimai Kaisha	50
Sakai, Izumi	Otsuka Seimai Sho	20
"	Shuzo Kaisha Seimai Sho	20
Kobe	Nihon Seimai Kaisha	250
"	Ryoyei Kabushiki Kaisha	70
"	Shinkawa Seimai Sho	20
"	Shinkawaguchi Seimai Sho	20
"	Wakabayashi Seimai Sho	15
"	Sugitani Seimai Sho	5
Nishinomiya, Settan ..	Beikoku Shokai Seimai Sho	20
"	Hachimma Seimai Sho	10
Nada, Setau	Kogyo Kaisha Seimai Sho	80
"	Ishizaki Seimai Sho	20
Akashi, Harima	Suga Seimai Sho	10
Himeji, Harima	Johoku Seimai Sho	10
Shikama, Harima	Ban-yo Seimai Kaisha	22
Okayama, Bizen	Okayama Seimai Sho	35
Saidaiji, Bizen	Saidaiji Seimai Sho	12
Otoko, Bizen	Otoko Seimai Kaisha	10
Nadekawa, Bitchu	Nadekawa Seimai Kaisha	15
Kurashiki, Bitchu	Kurashiki Seimai Kaisha	17
Tamashima, Bitchu	Tamashima Seimai Sho	17
Tokuyama, Suho	Bocho Seimai Kaisha	15
Tokura, Bizen	Imo Seimai Sho	12
Moji, Bizen	Moji Seimai Sho	40
Hakata, Chikuzen	Chikuzen Seimai Sho	10
"	Nakajima Seimai Sho	8
"	Dekunachi Seimai Sho	7
Total for 28 mills ..	.. ..	790

I also give a return, obtained from Japanese sources, of the amount of rice exported during the year ended October 31 last:—

UNCLEANED RICE.

			Europe	America.	Australia.	Total.
			Tons.	Tons.	Tons.	Tons.
1892.						
November	..	..	1,268	375	430	2,073
December	..	..	2,101	1,850	29	3,980
January..	..	..	4,995	150	640	5,785
1893.						
February	..	..	1,450	209	400	2,059
March	..	..	6,375	3,714	200	10,289
April	..	..	1,902	..	50	1,952
May	..	..	6,460	4	400	6,864
June	..	..	2,000	46	..	2,046
July	..	..	300	..	..	300
August	..	..	375	..	..	375
September	..	..	2,375	..	150	2,525
October..	..	..	135	50	..	185
Total	..	..	29,736	6,398	2,299	38,433

POLISHED RICE.

			Europe.	America.	Australia.	Total.
			Tons.	Tons.	Tons.	Tons.
1892.						
November	..	..	629	125	460	1,214
December	..	..	2,647	100	888	3,630
1893.						
January..	..	..	3,145	623	1,000	4,768
February	..	..	4,298	169	700	5,167
March ..	..	..	4,653	222	534	5,409
April ..	..	..	2,899	528	599	4,026
May ..	..	..	1,511	170	598	2,279
June ..	..	..	1,685	78	130	1,893
July ..	..	..	1,130	201	611	1,942
August ..	..	..	549	103	725	1,377
September	..	..	100	164	267	531
October..	..	..	5	55	603	663
Total	..	..	23,251	2,538	7,110	32,899

The year opened with a good demand, principally for China, Copper. but an advance created in Sumitomo's mark shortly checked business for a time. In June the market was strong, and buyers

at enhanced prices came forward, which caused holders to put up prices still further. A fair amount changed hands towards the end of the year, which closed with a firm market, buyers holding off for a decline.

Throughout a steady business has been done owing to falling exchange. Export to Europe shows a decrease, while that to India has risen.

Tea.

The season opened on April 28, a little earlier than usual, and at first, buying was restricted, owing to the high prices asked by dealers, who took advantage of a small decline in exchange to demand an advance of at least 3 dol. per picul (133½ lbs.) over last season's opening quotations.

Till the middle of May, cold and wet weather retarded the growth and preparation of the leaf, and when at last supplies came forward freely, it was found that the new crop showed a falling-off when compared with the previous season's production.

Buyers, therefore, found it a difficult matter to match standards, and had to pay high prices to get at all near the mark with the fine grades. However, they had to keep their firing places filled and shipments going forward regularly, and although dealers moderated their ideas of value later on, a substantial advance on the average price per picul during the last 2 years was established.

Between June 24 and July 1 there was a drop of 8 per cent. in exchange, but the bulk of the first crop had already gone forward, so dealers at once advanced prices for the second crop leaf, which was poor and disappointing in quality; an animated demand sprang up, however, and the position they assumed was fully maintained.

Owing principally to financial difficulties in the United States, the season has not been a prosperous one to the exporter, and continued advices of a dull market and weakening prices have curtailed late buying to a great extent.

Consequently, the decrease for the year amounts to 8,699 piculs, as compared with 1892.

It is worthy of note, that one-half of the year's supply was purchased between May 1 and June 22, and, therefore, all first crop leaf.

Settlements for 1893 amount to 143,187 piculs, against 150,554 piculs in 1892; value of the crop in silver yen (1 dol.) was 3,058,121, against 3,102,615 silver yen in 1892; the average price per picul was 21.37 silver yen, against 20.68 silver yen in the preceding year.

The synopsis of tea settlements for 1893 is:—

Piculs (133½ Lbs.).	At—		Currency.
	From—	To—	
	Dol. c.	Dollars.	Dollars.
6,262	8 0	12	62,620
25,152	12 0	16	358,366
37,786	16 50	20	689,595
32,562	20 50	25	740,785
29,859	25 50	30	814,058
9,688	30 50	35	319,539
1,482	35 50	40	56,316
401	40 0	Upwards	16,842
143,187	..	..	3,058,121

The increasing importance of this district as one of the centres of the tea trade may be easily gathered from the following return, based on customs statistics :—

District.	1883.		1893.	
	Quantity.	Value.	Quantity.	Value.
	Lbs.	Dollars.	Lbs.	Dollars.
Hioغو and Osaka ..	14,436,219	2,350,111	18,163,325	2,802,860
Yokohama ..	20,881,333	3,688,307	21,570,521	4,820,707

There are distinct signs of an increase in this class of business ; Silk and silk expansion must necessarily be slow, owing to exceedingly adverse manufactures. conditions, fully referred to in former reports.

Prices ranged between 61 dol. per picul to 48 dol. per picul Camphor. (133½ lbs.); the total business transacted shows a slight decrease on that of 1892.

Formosa camphor is steadily on the increase, but, so far, Japanese dealers do not seem to realise the position.

The market opened at 7 dol. 75 c. per picul to 8 dol. per picul, Antimony, and after falling to 6 dol. 80 c. per picul it again rose to the former level. The total business shows an increase of 84 tons over 1892.

During the first 5 months of the year a steady business was Rags. done at prices ranging from 2 dol. 50 c. to 2 dol. 80 c. per picul, when values declined to 1 dol. 98 c. In September a considerable business was done at 2 dol. 25 c., with an upward tendency. A further advance occurred, but a downward tendency soon showed itself, and the year closed dull.

Transactions were less than those of 1892 by 280 tons.

Prices varied during the year between 12 dol. 10 c. and Wax. 13 dol. 75 c. per picul. The business for the year was 444 tons in excess of 1892.

This article of export still continues to be in increasing Floor-matting demand, principally for America.

The quantity exported in 1883 represented a value of 212 dol. Last year the amount was 1,720,300 dol.

Rug manu-
factories.

The rug industry at Sakai, near Osaka, is making rapid strides. There are at present 524 factories, employing 7,292 hands, of whom 2,128 are males, and 5,164 females. The total turnout for last year represented a value of 701,039 dol., almost entirely exported to foreign countries.

Matches.

The export of this article continues to increase, and competition in the far East on the part of the European-made article is practically at an end.

The business done in 1893 was 13,049,656 gross, valued at 3,417,232 dol. In 1883 the export trade only amounted to 67,600 gross, valued at 1,876 dol.

Umbrellas.

These are largely made, according to foreign patterns, in Osaka. The sticks come principally from Tokio, the ribs from Germany, the covers from various parts of the country. Japanese use, almost exclusively, home-made umbrellas, and there is a large and increasing business done with China and the Straits.

The export from this district in 1883 was 79,745 in number, whereas in 1893 it was 1,532,866.

Coal.

The incalculable harm done by the recent lamentable struggle in the English coal trade has made itself felt in the far East, and Japanese colliery owners are reaping temporary, if not permanent advantages.

The effects of the coal strike are felt even in Kobe, the price of Moji coal having risen considerably.

Before the opening in 1888 of Moji, situated in Kiushire and opposite to Shimonoseki, Singapore, was the last coaling station on the way home, and the first on the way out. Until the strike English coal only was taken at Singapore. Now, however, Japanese coal is principally supplied.

The bad example set by Westerners in their manner of settling trade disputes is being followed by the Japanese, and during the past 18 months there have been several instances of strikes among them, one by the miners at Takashima, near Nagasaki.

Bamboo
trade.

The authorities recently caused an inquiry to be instituted into the position of this business, which for some time past has increased very considerably.

Thirteen years ago there were only five workers in bamboo ware in Osaka, the articles manufactured being principally those used in the Japanese ceremonial tea drinking.

Later on some of these firms removed to Kobe (Hiogo), and the export business, now rapidly on the increase, dates from that time.

Banking
facilities.

With regard to banking facilities here, these are, I am informed, altogether insufficient.

There is only one foreign bank established here, and that an agency of the Yokohama branch. There are, it is true, two other foreign banks. They are managed by, and in the hands of local mercantile firms.

The disadvantage as regards the local office of this one bank, an excellent institution by the way, and ably managed in the interest of shareholders, is that, being only an agency, it has to take its orders from the manager in the northern port.

That its power of action is restricted is shown by the fact that firms established in business here constantly find it advantageous to make settlements in Yokohama. Then, too, the day's business invariably depends on and awaits the arrival of a morning telegram from Yokohama.

That this and other matters are a cause of much inconvenience and seriously hamper the despatch of business requires no special comment.

A good deal was heard last year both here and in Yokohama ^{Boycotting.} about the boycotting of some foreign firms by guilds of Japanese merchants.

It has been rightly remarked by more than one foreign newspaper published in Japan that a number of merchants are at perfect liberty to enter into a combination for the purpose of suspending business with any firm against whom they have a grievance, real or imaginary. In this connection the following notice in Japanese and English to be seen in some Japanese premises in this town is rather amusing than otherwise: "Hereafter, 11th instant, we refuse the transactions with the undersigned firms."

That a refusal to transact business, if exercised with proper discrimination and honesty of purpose, might often prevent disaster, or produce very salutary results, is well-known to the entire business world, but no body of men have a shadow of right to obtain the co-operation of others by coercion, as is the case when threats of personal violence are conveyed to every merchant who seeks to do business with a boycotted firm.

This has often been, as elsewhere, the case here, and is much to be regretted. Not only does such conduct alienate all sympathy with the offenders, but it is calculated to affect the public peace to a very serious extent.

While writing the foregoing remarks my attention has been drawn to a telegram from Nagasaki, appearing in Japanese newspapers, to the effect that Chinese merchants there had formed an alliance against the Japanese traders, causing much trouble among the latter.

Be this report correct or otherwise, the fact remains that a combination, such as that referred to, is quite feasible among Chinese, though utterly impossible as regards other foreigners living and trading in this Empire. In other words, concerted and united action is possible in the case of traders of one nationality, not so where conflicting interests are accentuated by differences of race and nation and intensely keen competition.

The general custom-house facilities for landing, shipping, and storing cargo, and the pier accommodation for ordinary passenger traffic, have, for many years past, been altogether inadequate as regards the constantly-growing requirements of this port. ^{Custom-house and landing accommodation.}

The following returns show the steady increase in the commercial importance of this district since its opening to foreign trade in 1868 :—

Years.	Imports and Exports.	Foreign Ships Entered.	
		Number of Vessels.	Tons.
	Dollars.		
1868	8,072,301	193	120,885
1878	12,180,354	177	131,347
1888	44,966,304	471	762,758
1890	52,529,069	528	850,888
1891	52,243,943	524	872,870
1892	58,565,840	561	930,503
1893	73,642,720	705	1,200,417

In addition to the above the number and tonnage of Japanese ships of foreign build entering is very considerable. In 1892 it was 360, with 342,800 tons, and in 1893, 327, with 307,640 tons.

CUSTOMS Duties, &c., collected.

Year.	Imports.	Exports.	Miscellaneous.	Total.
	Gold yen.	Gold yen.		Gold yen.
1868	Particulars not obtainable.			
1878	170,854·93	172,963·52	..	343,818·45
	Silver yen.	Silver yen.	Silver yen.	Silver yen.
1888	1,169,088·55	874,682·39	34,196·32	1,677,967·26
1890	1,263,020·25	399,754·51	36,641·55	1,699,416·31
1891	1,085,236·86	385,443·47	40,304·45	1,510,984·78
1892	1,328,028·18	380,105·06	41,343·27	1,749,476·51
1893	1,603,347·49	369,526·34	46,641·15	2,019,514·98

NOTE.—The yen is equal to 1 Mexican dollar.

The accommodation referred to is, at the present moment, what it was 20 odd years ago, but it is very gratifying to be able to state that the representations made in this respect are now receiving very careful consideration, and that, too, it is rumoured, in connection with a most comprehensive scheme for general improvements.

Exchange. The accompanying return shows the fluctuations in exchange —in other words, the fall of the silver dollar and the rise of the silver rupee during the year 1893.

Shipping. The total tonnage for 1893 of ships of foreign build, owned by foreigners and Japanese, entering this port is 1,508,057 tons, being 234,754 tons in excess of that for 1892.

Of this the foreign tonnage is 1,200,417 tons, against 930,503 tons in 1892, showing an increase of 269,914 tons entered.

The increase as regards British shipping is 184,636 tons entered.

The percentage of foreign ships entered during 1893 is :—

Nationality.	Number of Vessels.	Tons.
British	64 $\frac{6}{10}$	70 $\frac{3}{10}$
German	18 $\frac{6}{10}$	11 $\frac{7}{10}$
French	7 $\frac{6}{10}$	9 $\frac{7}{10}$
American	3 $\frac{6}{10}$	4 $\frac{3}{10}$
Austrian	1 $\frac{6}{10}$	2 $\frac{6}{10}$
Other countries	4 $\frac{3}{10}$	1 $\frac{6}{10}$

During the year under review the principal increase in shipping is :—

ENTERED.

Nationality.	Number of Vessels.	Tons.
British	81	184,636
Austrian	13	30,500
German	32	30,183
American	10	29,683

The increase in German tonnage is steady and large. In 1883 the German tonnage was 12,564 tons, as against 131,280 tons in 1893.

The Austrian tonnage is that of the Austrian-Lloyd's steamers running monthly from Trieste to this port.

There is a decrease in French shipping of 5,891 tons, and in Japanese of 35,160 tons.

The following table shows the increase in foreign shipping in this district during the past 20 years :—

Nationality.	1873.		1883.		1893.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.
Total foreign shipping	272	288,632	177	207,713	705	1,200,417
Principal nationalities—						
British	109	74,081	124	159,298	456	844,373
German	27	10,353	18	12,564	131	137,093
French	5	2,852	1	300	53	117,230
American	109	189,533	21	28,178	23	50,472
Chinese	7	5,360	...	...	2	2,422

The decrease in American shipping, shown in the above return, is due to certain United States mail steamers having been sold and transferred to Japanese.

The importance of the shipping in this district is shown by the following returns for 1883 and 1893:—

TOTAL FOREIGN AND JAPANESE SHIPPING ENTERED.

Consular District.	1883.		1893.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.
Hiogo and Osaka ..	322	362,045	1,032	1,508,057
Yokohama	372	629,707	553	986,254

TOTAL FOREIGN SHIPPING ENTERED.

Consular District.	1883.		1893.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.
Hiogo and Osaka ..	177	207,713	705	1,200,417
Yokohama	313	556,024	478	837,696

BRITISH SHIPPING ENTERED.

Consular District.	1883.		1893.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.
Hiogo and Osaka ..	124	159,298	456	844,373
Yokohama	115	153,830	336	629,397

It is of interest to note that the tonnage of foreign vessels entering this district was in 1893 considerably over five-fold what it was 10 years ago, that of Yokohama being less than double.

The tonnage of British ships entering here in 1893 was nearly equal to the entire foreign tonnage of Yokohama. The foreign and Japanese (foreign build) tonnage entered is 500,000 tons in excess of Yokohama.

The entire foreign tonnage here was half as much again as that of Yokohama, this being accounted for by the fact that the trade here is of an exceedingly bulky nature as compared with the northern district.

It has, on occasion, been stated that the excessive tonnage in this district as compared with Yokohama is due to vessels calling here both on the outward and homeward-bound voyages. This is true; but there is practically nothing in that argument.

The large tonnage of ships clearing in ballast from Kobe for

Yokohama proves that entire outward cargoes are discharged at this port, as shown by the large excess of imports here over those at the northern ports (nearly 11,500,000 dol.).

To take on board the homeward cargoes—which, as already stated, are invariably bulky—the ships have, of course, to call and enter here on the return voyages.

The following return shows the importance of this district as compared with the entire British shipping entering Japanese ports:—

TOTAL British Shipping Entering all Japanese Ports in the
undermentioned Years.

Nationality.	1873.		1883.		1893.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.
British	405	234,469	580	607,024	1,360	2,464,119

PERCENTAGE in the undermentioned Districts.

District.	1873.		1883.		1893.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.
Hioغو and Osaka ...	27	32	21	26	33	34
Yokohama	34	43	19	25	24	25

The following return shows that the British shipping of this district has increased more than eleven-fold during the past 20 years:—

BRITISH SHIPS ENTERED.

Year.					Number of Vessels.	Tons.
1873	..	..	..	..	109	74,081
1883	..	..	..	..	124	159,798
1893	..	..	..	..	456	844,373

The total number of British and foreign shipping entered and cleared in this district during the undermentioned years is:—

Nationality.	1873.		1883.		1893.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.
British	283	204,609	247	315,750	907	1,678,586
„ and foreign	700	864,192	348	407,172	1,388	2,383,883

(1806)

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While on the subject of shipping, it is of great interest to note that the coast of Japan has for some years past been recognised as being one of the best lighted in the world. The lighthouse system is admirably managed.

General
remarks.

The fluctuations in silver and its depreciation with regard to gold having attracted much attention in this Empire, the Government appointed, in October last, a committee, consisting of a president, a vice-president, and 20 members selected from among the Administration, the University Staff, the members of the Diet, and others of recognised weight and experience in financial matters.

The committee's labours were defined to be:—

1. To inquire into the course and general effect of the recent fluctuations in the relative value of silver and gold.
2. To determine the influence and effect of those fluctuations on the finances of the Empire.
3. To decide whether those fluctuations necessitate reform in the present monetary system, and, if so, what standard should be adopted, and what measures taken to establish such new standard.

The result of the deliberations is being looked forward to with great interest.

With reference to those violent fluctuations and the steady fall in the value of silver, the President of the Bank of Japan stated in his address at the annual general meeting of shareholders that in October last some officers of the bank had been despatched to India and the United States to investigate and report on the causes and effects of this vital problem.

Cases of usury excepted, interest was, not many years ago, as high as 30 per cent. per annum, but the following return, based on investigations instituted by the Bankers' Union of Tokio, shows how steady and great the fall in the rate has been:—

Year.						Average Rate of Interest.
						Per cent.
1868	..	..	..	..	..	18
1869	..	..	..	..	..	18
1870	..	..	..	..	..	18
1871	..	..	..	..	..	18
1872	..	..	..	..	..	18
1873	..	..	..	..	..	14
1874	..	..	..	..	..	14
1875	..	..	..	..	..	14
1876	..	..	..	..	..	15·3
1877	..	..	..	..	..	12·6
1878	..	..	..	..	..	15·1
1879	..	..	..	..	..	16·3
1880	..	..	..	..	..	17·5
1881	..	..	..	..	..	16·8
1882	..	..	..	..	..	16·7
1883	..	..	..	..	..	10·8
1884	..	..	..	..	..	15·8
1885	..	..	..	..	..	11·4
1886	..	..	..	..	..	9·2
1887	..	..	..	..	..	8·75
1888	..	..	..	..	..	9·67
1889	..	..	..	..	..	10·17
1890	..	..	..	..	..	10·50
1891	..	..	..	..	..	9·39
1892	..	..	..	..	..	8·37
1893 (up to March)	..	..	..	..	..	7·84

A leading Japanese newspaper has recently referred to complaints about a great scarcity of money in the provinces, and regards it as an indication of increased prosperity, the reason for this opinion being the custom of farmers in Japan, when making profits, to secretly put away their savings, which are usually not spent for many a long day, or until hard times come.

Leading Japanese newspapers record that there are at present in Japan:—1,006 joint stock companies with an aggregate capital of 101,762,349 dol.; 131 national banks with 48,416,100 dol. capital, and sundry railway companies with a total capital of 73,124,000 dol. 14 new life insurance companies were started in this Empire during 1893.

In connection with life insurance in Japan a curious statement is made to the effect that on an average out of every three persons who insure their lives one fails to keep up the policy.

There are 11 electric light companies with a paid up aggregate amount of 1,674,713 dol. out of a nominal capital representing 2,477,250 dol.

There are 17 old and 54 new exchanges in Japan, the latter having been started under the new law passed quite lately. Their capital is estimated at 2,700,000 dol., they have proved remarkably profitable, but their rapidly increasing number may affect shareholders generally.

“According to returns made by the Home Department at the end of 1892, published in the ‘Official Gazette,’ the total (1806)

number of periodicals and newspapers published in the country was 972. Of these 228 were devoted to current topics and events, 11 to law, politics, and political economy, 69 were religious organs, 251 were devoted to education and fiction, 40 were supported by the medical profession, 167 treated of agricultural, commercial and industrial matters, and 26 were utilised for Government notices. During 1892, a total of 244,203,066 newspapers and magazines were printed; or 163 per diem for every 10,000 of the population. 460 new journals were brought into being, 434 ceased publication, and 87 were suspended. Tokio heads the list with 203 magazines and newspapers, Osaka coming next with 57. Kioto stands third with 46. Kanagawa prefecture only possesses 11 papers and magazines, as the majority of the people subscribe to the Tokio papers. Of prefectures, that of Hiogo publishes the greatest number, namely 36; Iwate has the fewest, only two. The number of newspapers and magazines published in 1890 was 716, and 766 in 1891. It will thus be seen that the newspaper enterprise is an increasing one from year to year."

The latest report published by the Department of Education shows that at the end of 1892 the total number of children that ought to have attended school throughout Japan was 7,356,724, and that of these 497,106 boys and 1,584,079 girls were unable to attend owing to a want of the necessary funds for school fees.

In Osaka, at the end of 1892, the number of agricultural, industrial, and commercial companies was 444, with a total capital of nearly 28,000,000 dol., and 52 national and private banks, with a total capital of upwards of 7,000,000 dol.

Since the Commercial Law came into existence the number and constitution of these concerns have been much modified, and at the beginning of the year there were 179, with an aggregate capital of upwards of 34,000,000 dol.

With the avowed object of making Japan self-supplying in the matter of sugar, and so put an end to the import of that staple, some wealthy merchants of Osaka and Tokio, availing themselves of a recent general meeting of cotton spinners in Osaka, have started a scheme for erecting a large refinery on a suitable site somewhere between Osaka and Kobe. It is currently reported that the opinion of the managing committee is strongly in favour of erecting the factory at Hiogo, where it seems that labour and the price of coal are cheap as compared with other places.

The capital with which the company is to start, said to be fixed at 1,000,000 dol., is to be raised in Tokio, Osaka, and Kobe, in shares of 50 dol. each.

The output is at present estimated at a little over 100,000 piculs.

The alternative plan for operations as proposed in the prospectus is either to encourage the cultivation in Japan of sugar, or to import the raw material. The latter seems for the present the

more feasible, as the cost of production is very much against this country.

In Kagoshima, situated in the south of the Island of Kiushiu, the cost per 100 lbs. is 5 dol. 84 c., and sometimes even as high as 7 dol. 36 c.; in the Loo Choo Islands it is 4 dol. 31 c., whereas in the Philippines it is only 1 dol. 67 c.

It is also rumoured that arrangements for the erection of a sugar refinery, with a capital of 750,000 dol., at Yaeyama, in the Okinawa Ken (Loo Choo Islands) have been completed.

At this port a Japanese company is being formed, with a capital of 350,000 dol., to dig a canal through a long land-spit, known as Wada Point, and so shorten the distance to Hiogo for ships of small draught running in the Inland Sea.

The question of radical and much-needed improvements in the drainage systems of Osaka and Kobe is receiving careful attention. The authorities of the former city have come to the conclusion that faulty sewerage is a prime cause of constantly-recurring zymotic diseases, and that no permanent relief is obtainable by the annual expenditure of large sums of money for sanitary purposes.

It is, therefore, proposed to change the entire sewerage system at a cost of about 700,000 dol. The works will necessarily be of a very extensive nature, and are calculated to occupy about 5 years. The approval of the City Assembly has not yet been obtained, but no serious opposition is anticipated.

It has been rumoured since the above was written that some of the spinning mill owners of Osaka contemplate starting a spinning bank, that is, one devoted solely to the cotton spinning interests, with a capital of 1,000,000 dol.

It is also stated that steel works are to be established very shortly at Sakai, a rising town close to Osaka, and noted for its cutlery ware.

Railway construction has made steady progress since 1872, Railways. when the Tokio-Yokohama line was completed.

The total mileage of all railways in operation on March 31, 1893, was 1,877 miles ·05 chains. Of this 557 miles are Government lines, averaging a cost of 60,667 dol. per mile. The most costly portion was the Tokio-Yokohama section, begun in April, 1870, and completed in September, 1872, its length being 18 miles, and the average cost per mile 163,457 dol. The cheapest was the Otsu-Nagahama section, begun February, 1888, and completed July, 1889, its length being 48 miles, and the average cost 34,008 dol. per mile.

Private railways were commenced in 1888, much attention being devoted to them till 1892, when financial reasons intervened, and the ardour temporarily cooled off.

Towards the end of 1893, however, some 62 applications were under consideration by the Railway Council, who, according to Japanese journals, are somewhat perplexed how to deal with these numerous schemes. The total mileage is some 1,400 miles representing a capital of 56,200,000 dol.

Six applications were accepted and five rejected. The remainder were held over for further consideration.

It is also stated that, exclusive of the above, several other private lines, with lengths varying between 9 miles and 43 miles, have been sanctioned, the total mileage being 264, and the capital involved 9,245,000 dol.

What with the lines already sanctioned, those approved of and likely to be sanctioned, Japan will within the next 20 or 30 years have some 4,600 miles of railway.

The average profit on Government lines is rather more than 6 per cent.; that of private lines slightly in excess of 5 per cent. Some of the latter have, however, earned considerably in excess, the profit for 1893 on the Nippon Railway, running north of Tokio, being 10 per cent., and that of the small Haukai line from Osaka to Sakai 15 per cent.

The local portion, and possibly the most important section, of the Grand Trunk Line of Japan, connecting from this port with the Government line and the Nippon Railway system—the San'yō Railway—will very shortly be opened up to Hiroshima, about one-half of the whole length up to Shinonoseki, where, after crossing the Straits, it joins the Kiushiu system. The entire line is expected to be completed within two years.

While on this subject some allusion may be made to the works commenced last year by the Kōbu Railway Company, with a view to connecting the present terminus at Shinjiku, the western suburb of Tokio, with Misakicho in Kanda, an open space opposite the Koishikawa Arsenal, and formerly used as a parade ground by the Artillery Division of the Imperial Guards.

This loop line, a little over 4 miles long, was commenced in July last, and will take about one year to complete; it runs through the city, and the work is consequently slow.

The most difficult portion is the construction of a tunnel about 1,000 feet in length, presenting many difficulties, and being, moreover, expensive, owing to the nature of the soil, the proximity of stone and brick buildings, and, above all, the nearness of the top of the tunnel to the surface of the ground.

The cost is estimated at about 500,000 dol., and when completed the line will serve to draw population to certain suburbs which have up to now been comparatively neglected.

When the line has been extended, as contemplated, to the Shitaya district, Tokio will have a metropolitan system of railway very little, if at all, inferior to that of Paris or Berlin.

One feature of railway enterprise in this Empire is, in the near future, an elevated line in Tokio.

That railways in Japan are paying concerns is shown by the following return of the principal railway companies' shares, and of their annual dividend up to the end of June last:—

Railway Company.	Sum Paid up per Share.	Dividend.	Price.	Ratio of Dividend to Price.
	Yen.	Per cent.	Yen.	Per cent.
Nippon	50	10	104	4·8
Ryomo	50	8	79	5
Kobu	45	10	111	4
Kwansai	47	4	60	3·1
Sanyo	27	4·5	32	3·7
Kiushiu	38	4·7	40	4·4
Tauko	50	7·5	80	4·7

While on the subject of railways it may not be out of place to state that there is talk of some practical steps being taken in the direction of increasing the speed on all railways, particularly on the Kobe-Tokio trunk line, 376 English miles in length.

On this line the journey takes $19\frac{1}{2}$ hours, the average speed being less than 20 miles per hour.

A large railway project, affecting the central portion of this Empire, is said to be on foot, and the original scheme of connecting Tokio and Osaka via what is known as the "Nakasendo" seems likely to be revived. The proposed line will run through important timber, silk, cereals, porcelain, woven fabrics, and lacquer-producing districts. The total length will be 338 miles, and the cost is estimated at 21,000,000 dol.

RETURN of Principal Articles of Import to the Ports of Hiogo and
Osaka during the Years 1893-92.

Articles.		1891.		1892.	
		Quantity.	Value.	Quantity.	Value.
			£		£
Cotton manufactures—					
Hawkerchiefs	Dozen ...	172,228	11,693	168,347	11,920
Threos	Lbs. ...	146,995	9,229	125,118	8,406
Yama	" ...	10,364,519	481,497	17,819,843	529,392
Piece-goods—					
Crinizes	Yards ...	2,668,247	32,792	2,015,513	22,885
Satins	" ...	4,621,568	87,095	3,619,963	55,192
Shirtings	" ...	21,384,108	169,559	19,116,041	149,710
T. goods	" ...	1,731,160	14,402	374,542	7,565
Turkey reds	" ...	2,784,892	24,090	3,039,919	26,666
Velvets	" ...	1,128,392	30,127	1,438,055	39,994
Victoria lawns	" ...	1,218,943	8,000	...	...
Miscellaneous... ..	" ...	...	13,155	...	19,745
Total			863,679		862,645
Cotton—					
Raw	Lbs. ...	99,321,885	1,650,240	80,973,051	1,250,958
Unginned	" ...	29,292,576	115,376	44,610,712	184,742
Total		128,614,411	1,765,616	125,583,763	1,435,700
Woolen manufactures—					
Blankets	Lbs. ...	794,897	49,488	577,525	36,297
Cloth	Yards ...	341,219	36,444	234,448	27,573
Flannels	" ...	2,144,487	100,692	1,739,186	86,400
Italian cloth	" ...	2,97,541	65,442	2,040,675	70,829
Mousseline de laine	" ...	8,894,728	173,268	7,809,565	172,399
Miscellaneous piece-goods	" ...	...	12,892	...	26,796
Wool	Lbs. ...	606,655	17,335	259,694	9,653
Yarn	" ...	190,840	20,615	186,491	17,693
Total			479,841		441,650
Metals—					
Iron—					
Bar	Tons ...	8,230	51,103	9,526	63,623
Nails	" ...	5,417	59,360	5,607	36,544
Pig	" ...	14,094	4,349	8,806	27,900
Plate	" ...	2,305	14,213	1,791	12,179
Rail	" ...	11,602	45,409	1,159	7,916
Waste	" ...	...	26,924	...	19,407
Wire	Tons ...	693	8,079	692	16,825
Sundry	" ...	...	22,711	...	15,333
Lead	Tons ...	1,384	28,944	2,761	35,340
Steel and steelware	" ...	...	46,648	...	79,734
Tin	Tons ...	92	8,022	88	3,729
Zinc	" ...	2,499	50,491	1,797	48,796
Miscellaneous... ..	" ...	...	23,371	...	26,198
Total			410,904		337,564
Kerosene oil	Gallons ...	26,078,553	290,613	13,157,805	200,776
Rice	Tons ...	54,915	288,646	35,735	229,594
" other grains	" ...	...	29,152	...	8,307
Total			317,798		237,901
Sugar—					
Brown	Tons ...	12,128	109,501	9,169	92,947
White	" ...	29,563	466,384	29,168	434,333
Miscellaneous... ..	" ...	3,662	5,333	1,540	3,124
Total		44,753	575,718	39,815	549,804
Miscellaneous					
Arms and munitions of war	" ...	...	17,690	...	12,158
Alc. beer, and porter	" ...	...	5,474	...	8,399
Beans, peas, and pulse	Tons ...	81,812	391,005	73,923	325,196
Boilers, steam	" ...	...	14,000	...	5,729
Books and stationery	" ...	...	34,879	...	39,357
Carts and drays	" ...	...	15,661	...	16,691
Checks and watches	" ...	...	21,004	...	13,377
Clothing	" ...	...	15,663	...	13,377

RETURN of Principal Articles of Import to the Ports of Hiogo and Osaka during the Years 1893-92—continued.

Articles.			1893.		1892.	
			Quantity.	Value.	Quantity.	Value.
				£		£
Miscellaneous—continued—						
Chemicals and drugs—						
Alcohol	Tons	...	564	9,633	469	11,378
Bicarbonate of soda	"	...	918	5,953	695	4,450
Caustic soda	"	...	1,872	16,303	1,719	15,621
Salicylic acid	Lbs.	...	51,117	13,747	35,616	9,485
Carbolic acid	"	...	...	...	81,191	1,566
Potash—						
Chlorate of	"	...	2,914,198	89,730	1,737,179	39,464
Other	"	...	23,015	5,202	40,600	6,471
Phosphorous amorphous	"	...	160,300	20,588	105,347	11,809
Miscellaneous drugs	"	...	...	82,325	...	70,714
Dried sardines, for manure	Tons	...	1,936	8,498	1,861	8,382
Dyes and paints—						
Aniline	Lbs.	...	322,872	24,128	314,724	25,850
Logwood, extract of	"	...	796,393	13,816	670,901	12,092
Vermilion	"	...	48,145	4,977	51,483	6,112
Miscellaneous	"	...	...	46,909	...	39,704
Glass and glassware	"	...	...	35,159	...	26,659
Gunny bags	Number	...	1,064,600	13,733	398,200	7,755
Hats and caps	Dozen	...	31,356	23,317	25,342	24,802
Hides	"	...	...	49,460	...	49,570
India-rubber ware	"	...	...	3,810	...	4,903
Instruments	"	...	...	2,654	...	2,960
Lard and tallow	Tons	...	...	...	168	2,866
Leather	Lbs.	...	690,734	31,548	832,723	39,159
Locomotive engines	"	...	...	24,865	...	7,313
Machinery—						
Spinning	"	...	...	238,028	...	45,262
Other	"	...	...	58,518	...	37,698
Mats	"	...	...	8,071	...	7,613
Oil-cakes	Tons	...	15,415	54,097	24,059	84,958
Oil—						
Castor, for lubricating	Lbs.	...	229,277	1,962	208,155	1,858
Cocoa-nut	"	...	470,505	4,054	537,043	4,035
Paraffin-wax	"	...	2,373,753	18,235	2,298,551	28,459
Portland cement	Tons	...	668	1,136	1,127	2,095
Provisions	"	...	...	26,575	...	31,805
Railway carriages	"	...	...	11,135	...	3,825
Rattans	"	...	...	5,535	...	6,107
Steamers	Number	...	8	51,665	5	52,363
Satins, silk and cotton mix- tures	Yards	...	85,107	5,790	202,423	15,660
Textile fabrics, miscel- laneous, raw materials thereof	"	...	...	67,766	...	40,951
Tobacco	"	...	...	11,975	...	...
Tortoiseshells	"	...	...	2,308	...	2,866
Wines and spirits	"	...	...	7,160	...	5,872
Miscellaneous	"	...	...	96,308	...	99,802
Total			...	1,710,479	...	1,318,141
Recapitulation—						
Cotton manufactures	"	...	...	863,659	...	862,645
" raw	Lbs.	...	128,614,411	1,765,616	114,431,085	1,465,677
Woolen manufactures	"	...	...	478,841	...	441,650
Metals	"	...	...	410,004	...	337,564
Kerosene oil	Gallons	...	26,078,553	290,013	13,157,805	200,776
Rice and other grain	"	...	...	317,198	...	237,901
Sugar	Tons	...	44,753	575,718	39,815	549,804
Miscellaneous	"	...	...	1,710,479	...	1,318,141
Grand total			...	6,411,528	...	5,414,158

RETURN of Principal Articles of Export from the Ports of Hiogo
and Osaka during the Years 1893-92.

Articles.		1891		1892	
		Quantity.	Value.	Quantity.	Value.
Rice	Tons	66,686	£ 464,519	62,918	£ 527,915
Tea					
Green					
Pampered	Lbs.	15,208,169	344,735	16,595,043	400,581
Baked & dried	"			318,916	8,854
Dust	"	2,582,644	11,465	2,640,858	12,069
Sundry	"	372,512	2,916	611,603	4,112
Total		18,163,325	359,116	20,066,120	425,616
Metals—					
Antimony	Tons	1,309	23,551	1,219	23,960
Brass wire	"	149	6,367	215	9,825
Bronze	"	412	11,668	265	7,494
Copper—					
Bar and slab	"	6,877	278,465	7,712	314,647
Ingots	"	941	45,169	1,041	50,267
Sundry	"		15,364	212	13,891
Total			370,809	10,959	419,714
Dried fish—					
Cuttle	Tons	1,786	53,432	1,569	40,183
Iriko or béche-de-mer	"	188	6,864	164	7,866
Shell-fish	"	183	8,896	167	7,233
Shrimps	"	724	22,289	1,041	30,267
Sundry	"	248	4,149	284	3,167
Total		3,054	95,630	2,897	91,555
Coal	Tons	52,298	25,921	58,090	36,990
Miscellaneous—					
Bamboo			15,577		15,672
" ware			26,812		26,604
Bronze			7,566		16,828
Camphor	Tons	1,426	162,398	1,713	175,000
" oil	"	261	8,784	416	5,619
Clothing and apparel			26,930		
Copper ware			8,815		
Cotton manufactures			126,674		78,771
Drugs, miscellaneous			26,889		26,553
Fans	Number	15,217,171	49,880	16,249,396	44,026
Feathers and furs			1,081		5,790
Fish oil	Tons	1,048	8,171		
Gall-nuts	Lbs.	417,728	6,715	321,762	4,961
Ginseng	"	62,662	11,893	89,892	17,240
Glassware			26,158		19,491
Kauten, isinglass	Lbs.	1,743,801	75,413	2,871,171	7,406
Lacquered ware			24,669		15,967
Matches	Gross	13,032,036	157,899	8,964,388	98,296
Matting			23,413		168,319
Mushrooms	Lbs.	1,130,573	47,369	1,688,747	4,964
Paper ware			9,177		12,783
Porcelain ware			197,362		116,687
Rags	Tons	5,465	30,000	5,715	28,712
Rapeseed	"	241	1,088	1,897	19,610
" oil	"	897	11,564	360	14,324
Screens	Number	128,765	39,470	129,967	46,402
Seaweed	Tons	1,497	6,579	3,266	16,694
Shells			3,990		6,388
Silk—					
Raw, waste			65,966		39,449
Manufactures			16,789		17,491
Soy			14,187		
Straw plaits	Bundles	310,419	16,694	110,769	7,611
Sulphuric acid			8,192		2,879
Timber and planks			13,772		19,082
Umbrellas	Number	1,921,326	65,026	1,069,791	44,260
Wax, vegetable	Tons	1,867	4,938	1,416	30,000
Miscellaneous			240,275		247,437
Total			2,691,661		1,795,174

RETURN of Principal Articles of Export from the Ports of Hiogo and Osaka during the Years 1893-92—continued.

Articles.	1893.		1892.	
	Quantity.	Value.	Quantity.	Value.
		£		£
Recapitulation—				
Rice	Tons ...	66,686	464,519	62,918
Tea	Lbs. ...	18,163,325	389,116	20,066,120
Metals	...	...	370,809	...
Dried fish	Tons ...	3,054	95,095	2,897
Coal	" ...	52,238	25,921	58,050
Miscellaneous... ..	...	...	2,001,401	...
Grand total	...	3,316,861	...	3,223,831

Table III.—RETURN of all Shipping Entered at the Ports of Hiogo and Osaka during the Year 1893.

Nationality.	Steam.		Sailing.		Total.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.
British	440	817,601	16	26,772	456	844,373
Japanese	327	307,640	...	...	327	307,640
German	128	131,280	3	5,813	131	137,093
French	52	115,910	1	1,320	53	117,230
American	14	35,696	9	14,776	23	50,472
Austrian	13	30,500	...	...	13	30,500
Norwegian	21	14,392	1	843	22	15,235
Chinese	2	2,422	...	...	2	2,422
Russian	2	1,426	...	...	2	1,426
Corean	2	888	...	...	2	888
Ecuadorian... ..	...	...	1	778	1	778
Total	1,001	1,457,755	31	50,302	1,032	1,508,057

Table IV.—RETURN showing the Value of Imports from and Exports to some of the Principal Countries and Ports during the undermentioned Years.

Year.	Great Britain and Colonies other than Hong-Kong.		Hong-Kong.		United States.		China.		Other Countries.		Total Trade
	Imports.	Exports.	Imports.	Exports.	Imports.	Exports.	Imports.	Exports.	Imports.	Exports.	
	Dollars.	Dollars.	Dollars.	Dollars.	Dollars.	Dollars.	Dollars.	Dollars.	Dollars.	Dollars.	
1888 ..	1,454,860	601,282	2,508,192	1,261,003	27,872	77,222	307,406	601,014	3,897,397	3,924,315	14,720,183
1893 ..	19,783,545	4,171,423	3,749,651	9,558,455	3,272,922	5,964,622	11,967,564	3,566,196	9,031,039	2,682,003	78,642,720

NOTE.—As it is impossible to fix a proper average rate for the Mexican dollar during 1883, it has, for the purpose of comparison, been deemed advisable to furnish this return in dollars.

Table V.—RETURN of Registered Foreign Residents and Firms at Hioغو and Osaka on December 31, 1893.

Nationality.	Hioغو.			Osaka.			Hioغو and Osaka.	Hioغو.	Osaka.	Total Number of Firms.		
	Adults.		Children.	Total Residents.	Adults.						Children.	Total Residents.
	Male.	Female.			Male.	Female.						
British	217	59	75	14	25	25	64	415	52	52		
American	50	23	18	14	26	15	55	143	16	16		
Austro-Hungarian	2	..	..	..	..	..	..	2	1	1		
Belgian	1	..	..	..	..	..	..	1	..	..		
Chinese	602	111	291	246	25	59	330	1,334	..	..		
Danish	6	4	10	..	..	..	..	20	..	..		
Dutch..	7	3	11	..	..	..	..	11	..	..		
French	19	10	4	..	8	..	8	41	3	3		
German	67	17	23	3	..	..	3	110	18	18		
Italian	1	..	..	..	..	..	..	1	..	..		
Norwegian	..	..	..	..	..	..	..	..	..	..		
Swedish	1	1	2	..	..	..	..	4	..	..		
Portuguese	14	5	7	..	..	..	..	26	2	2		
Russian	1	..	..	..	..	..	..	1	..	..		
Spanish	2	..	..	..	..	..	..	2	1	1		
Swiss ..	1	..	..	1	..	..	1	2	..	1		

DELIVERIES of Petroleum in Yokohama during the Years
1892-93.

Month.	1892.		1893.	
	American Oil.	Russian Oil.	American Oil.	Russian Oil.
	Cases.	Cases.	Cases.	Cases.
January.. ..	165,810	44,346	69,329	63,427
February	110,921	30,905	77,573	59,111
March	110,007	34,905	94,317	45,350
April	90,600	29,539	66,767	55,817
May	82,555	26,219	77,291	44,554
June	95,961	41,138	79,026	45,077
July	99,821	45,342	88,447	48,685
August	142,055	55,619	80,260	51,954
September	124,140	51,042	111,755	78,945
October	139,719	56,743	124,296	119,087
November	163,679	83,554	63,994	187,759
December	207,456	76,192	52,934	157,589
Total	1,532,624	575,634	985,989	957,355
Grand total ..	2,108,258		1,943,344	

Table VII.—AVERAGE Market Value of Petroleum in Kobe during the Years 1891-93.

Month.	1891.			1892.			1893.			Tank per 10 Gallons.	
	Atlantic.	Russian Oil.	Atlantic.	Chester.	Russian Oil.	150 % Oil.	Atlantic.	Comet.	Chester.		Russian Oil.
January	1.72	1.63	1.60 1.55 1.66	..	1.56	1.95	1.86 1.75 1.74	1.81	..	1.66	..
February	1.69	1.61	1.66 1.75	..	1.55	1.95	1.77 1.68	..	..	1.63	..
March	1.67	1.61	1.60	..	1.80	1.95	1.63	..	1.66	1.60	..
April ..	1.65	1.58	1.58	..	1.60	1.90	1.60 1.54	..	..	1.45	1.15
May ..	1.68	1.58	1.56	1.54	1.51	1.90	1.59	..	1.54	1.50	1.19
June ..	1.68	1.60	1.60	1.58	1.54	1.90	1.60	..	1.55	1.51	1.17
July ..	1.70	1.62	1.62	1.60	1.55	1.90	1.68	..	1.61	1.63	1.25
August	1.67	1.58	1.62 1.72	1.65	1.57	1.95	1.73 1.75	1.71	1.68	1.55	1.35
September	1.45	1.56	1.72	1.66	1.59	2.00	1.77 1.83	1.80	1.73	1.63	1.37
October	1.68	1.55	1.73 1.73	1.70 1.73	1.60	2.05	1.95	1.90	1.72	1.61	1.37
November	1.64	1.56	1.92 2.00	1.95	1.72	..	2.01 2.00	1.98	1.75	1.62	1.42
December	1.63	1.53	1.80 1.80	1.95	1.77	..	1.80	1.97	1.85	1.67	1.49

Table VIII.—RETURN of Fluctuations in Exchange at Hiogo (Kobe) during the Year 1893.

Month.		Private 4 Months' on London Credits.	Private 4 Months' on Paris.	Private 10 Days' on Shanghai.	Private 30 Days' on New York.
		s. d.	Fr. c.	Cents.	Cents.
January ..	{ highest	2 9 $\frac{1}{2}$	3 55	72	68 $\frac{1}{2}$
	{ lowest	2 9 $\frac{1}{2}$	3 53	72	67 $\frac{3}{4}$
February ..	{ highest	2 9 $\frac{1}{2}$	3 54	72 $\frac{3}{4}$	68 $\frac{1}{2}$
	{ lowest	2 9 $\frac{1}{2}$	3 52	72 $\frac{1}{4}$	67 $\frac{3}{4}$
March ..	{ highest	2 9 $\frac{1}{2}$	3 53	73 $\frac{1}{4}$	68
	{ lowest	2 8 $\frac{1}{2}$	3 48	72 $\frac{3}{4}$	66 $\frac{3}{4}$
April ..	{ highest	2 9 $\frac{1}{2}$	3 52	73 $\frac{1}{2}$	67 $\frac{3}{4}$
	{ lowest	2 9	3 49	73 $\frac{1}{2}$	67
May ..	{ highest	2 9 $\frac{3}{4}$	3 54	73 $\frac{1}{2}$	68 $\frac{1}{2}$
	{ lowest	2 9	3 47	72 $\frac{1}{2}$	67
June ..	{ highest	2 9 $\frac{1}{2}$	3 54	73 $\frac{1}{2}$	68 $\frac{1}{2}$
	{ lowest	2 6	3 25	73	61
July ..	{ highest	2 7 $\frac{1}{2}$	3 37	73	64
	{ lowest	2 5 $\frac{3}{4}$	3 23	71 $\frac{1}{2}$	60 $\frac{1}{2}$
August ..	{ highest	2 6 $\frac{1}{2}$	3 27	73	62 $\frac{3}{4}$
	{ lowest	2 6 $\frac{1}{2}$	3 19	72 $\frac{1}{2}$	61 $\frac{1}{2}$
September..	{ highest	2 6 $\frac{1}{2}$	3 22	73 $\frac{1}{2}$	61 $\frac{1}{2}$
	{ lowest	2 5 $\frac{1}{2}$	3 17	73	60 $\frac{3}{4}$
October ..	{ highest	2 6 $\frac{1}{2}$	3 17	73 $\frac{1}{2}$	60 $\frac{3}{4}$
	{ lowest	2 4 $\frac{1}{2}$	3 06	73 $\frac{1}{4}$	58
November..	{ highest	2 5 $\frac{1}{2}$	3 12	73 $\frac{1}{2}$	59 $\frac{1}{2}$
	{ lowest	2 4 $\frac{1}{2}$	3 02	72 $\frac{3}{4}$	57
December..	{ highest	2 5	3 05	73	58 $\frac{1}{2}$
	{ lowest	2 4	2 97	72 $\frac{3}{4}$	56 $\frac{1}{2}$

RETURN of Fluctuations in Exchange for Bank Demand Drafts on India at Hiogo (Kobe) during the Year 1893.

Month.				Per 100 Mexican Dollars.	
				Highest.	Lowest.
				Rupees.	Rupees.
January to May ..	..	..	..	221	221
June ..	..	..	..	221	190
July ..	..	..	..	192	176
August ..	..	..	..	196	192
September ..	..	..	..	195	193
October ..	..	..	..	194	190
November ..	..	..	..	189	184
December ..	..	..	..	185	180

Table IX.—STATEMENT showing the Names of the Existing Cotton Spinning Companies of Japan, the Number of Spindles at Work, the Amount of Yarn Produced, the Quantities of Cotton and Coal consumed, and the Number of Working Days used during the Six Months ended June 30, 1893, together with the Average Daily Calculations of the Number of Working Hours, and the Number of Employés and the Amount of their Remuneration.

Name of Company.	Spindles.			Yarn.			Cotton.	Coal.	Working Days.	Working Hours.	Employees.		Wages per Diem.	
	Ring.	Total.		Ring.	Total.						Men.	Women.	Men.	Women.
		Number.	Number.		Lbs.	Number.	Number.	Lbs.	Number.	Number.					Cent.	Cent.
Ozeki Bussai	27,837	976	28,813	3,579,739	177,416	3,757,155	4,298,244	9,671,680	168	27	711	1,893	14.65	9.45
Naruto Bussai	22,594	4,226	26,820	2,846,341	43,625	3,390,466	3,974,440	9,255,363	155	22	509	1,664	15.37	9.47
Mie Bussai	18,872	11,890	30,762	2,236,764	1,488,469	3,725,233	4,667,898	7,678,968	160	29	599	1,594	15.45	11.59
Katsuyama Bussai	28,769	1,880	30,649	3,125,548	96,125	3,221,673	3,948,688	9,388,266	184	22	369	1,616	26.08	14.92
Tenryo Bussai	6,897	10,632	16,440	711,408	314,225	1,025,633	2,393,844	4,467,665	109	23	366	791	18.93	11.78
Setsu Bussai	19,465	...	19,465	3,396,663	...	3,396,663	4,156,488	5,281,981	164	22	346	1,130	15.77	9.43
Ogawa Bussai	12,124	3,015	15,139	1,879,803	366,268	2,246,071	2,523,664	4,031,569	163	23	191	808	17.93	9.86
Tanaka Bussai	16,662	3,880	20,542	1,626,664	361,619	1,988,283	2,118,208	4,366,227	164	24	139	319	15.85	9.26
Kanagawa Bussai	13,652	...	13,652	1,137,336	...	1,137,336	1,393,775	3,768,993	179	22	163	335	20.92	9.40
Hime Bussai	11,491	...	11,491	2,088,588	...	2,088,588	2,487,708	3,996,806	168	22	210	780	15.45	8.97
Daikoku Bussai	9,315	891	10,206	944,476	47,603	1,022,355	1,188,446	5,696,688	161	24	236	763	13.92	9.98
Sagami Bussai	13,849	...	13,849	1,866,568	...	1,866,568	2,627,704	3,358,809	155	22	293	987	15.35	8.67
Mitsui Bussai	10,287	...	10,287	1,887,186	...	1,887,186	2,648,678	3,111,766	164	23	141	689	17.99	7.96
Nagoya Bussai	2,364	6,000	8,364	266,075	331,846	597,921	1,694,414	4,827,600	192	25	111	278	15.89	9.45
Osaka Bussai	12,688	...	12,688	1,896,888	...	1,896,888	2,261,725	8,273,617	163	23	125	729	18.94	7.99

Tokio Boseki...	6,080	2,880	8,960	1,086,706½	327,166½	1,418,875	1,607,488½	3,098,110	169½	23	153	387	19·58	8·83
Anagasaki Boseki ...	11,215	...	11,215	1,919,308½	...	1,919,308½	2,240,033½	3,698,864	164	22	208	664	13·68	7·42
Hiroshima Boseki ...	2,000	2,000	4,000	186,850	146,166½	303,016½	342,941½	1,351,464	188	22	86	169	17·52	5·12
Wakayama Boseki ...	667	4,890	5,557	207,616½	644,598½	852,175	942,475	1,908,866	161	23	118	210	15·69	9·24
Kurume Boseki ...	4,890	...	4,890	819,591½	...	819,591½	879,233½	2,220,451	160	24	89	645	16·92	5·95
Himeji Boseki ...	2,752	1,833	4,585	509,425	148,625	658,050	773,358½	1,491,330	158.	22½	137	267	20·60	10·50
Kurashiki Boseki ...	6,811	...	6,811	842,816½	...	842,816½	939,441½	2,058,262	129	22	105	302	15·27	8·65
Shimosuke Boseki ...	900	3,633	4,533	79,950	409,650	489,600	545,491½	519,660	155	22	66	153	13·93	7·67
Shinomura Boseki ...	1,608	2,900	3,608	229,066½	159,875	388,941½	460,525	1,449,350	128½	24	67	170	13·88	10·03
Kagoshima Boseki ...	1,230	1,800	3,030	39,066½	71,775	110,841½	127,625	452,745	156	11	37	51	15·86	6·22
Oajima Boseki ...	2,064	...	2,064	323,075	...	323,075	368,516½	710,000	160	22½	52	147	12·88	4·97
Watanabe Boseki ...	...	2,000	2,000	...	159,166½	159,166½	176,983½	...	160	23	20	72	16·24	8·17
Shimada Boseki ...	1,041	1,667	2,708	75,875	115,058½	190,933½	224,491½	...	149	19½	29	103	22·50	9·00
Enshu Boseki ...	...	1,800	1,800	...	84,516½	84,516½	100,916½	...	114	23	26	43	13·82	7·40
Yamato Boseki ...	...	2,000	2,000	...	249,025	249,025	282,425	718,265	157½	23	24	81	21·08	8·50
Aichi Boseki...	...	2,000	2,000	...	140,766½	140,766½	163,438½	424,380	127½	24	23	77	17·71	8·93
Magi Boseki ...	...	2,000	2,000	...	54,166½	54,166½	62,941½	...	103	12	13	30	17·53	6·35
Kuahara Boseki ...	...	2,000	2,000	...	156,066½	156,066½	182,041½	...	164½	24	21	85	20·45	8·40
Shotojima Boseki ...	2,000	...	2,000	245,816½	...	245,816½	288,159½	1,167,649	162	23½	31	127	13·72	7·47
Fuji Boseki ...	1,136	...	1,136	179,166½	...	179,166½	196,750	...	148	23	15	37	18·22	9·67
Fukushima Boseki ...	3,030	...	3,030	333,483½	...	333,483½	391,525	1,860,174	162	23	53	215	13·60	7·23
Fukuyama Boseki ...	3,648	...	3,648	177,525	...	177,525	208,166½	606,470	54	23	38	257	14·75	5·0
Total ...	270,298	75,172	345,470	36,852,801½	6,730,589½	43,583,475	52,196,488½	104,540,523	150½	22	5,780	19,219	16·79	8·42

* Water power.

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AND FINANCE.

MEXICO.

REPORT FOR THE YEAR 1893

ON THE

TRADE, &c., OF THE CONSULAR DISTRICT OF
VERA CRUZ

REFERENCE TO PREVIOUS REPORT, Annual Series No. 1218.

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1271. Erzeroum	4d.	1331. Patras	1d.
1272. Christiania	5d.	1332. Calais	2d.
1273. Buda-Pesth	4d.	1333. Loanda	1d.
1274. New York	3d.	1334. Bordeaux	2d.
1275. St. Petersburg	7d.	1335. Taganrog	5d.
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1277. Tokio	2d.	1337. Riga	2d.
1278. Bilbao	3d.	1338. Batavia	1d.
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MEXICO.

VERA CRUZ.

Consul Chapman to the Earl of Rosebery.

My Lord, *Vera Cruz, March 2, 1894.*
I HAVE the honour to forward herewith to your Lordship my
Report on the Trade and Commerce of Vera Cruz for the year
1893.

I have, &c.
(Signed) ARTHUR CHAPMAN.

Report on the Trade and Commerce of Vera Cruz for the Year 1893.

ABSTRACT of Contents.

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Vera Cruz has been affected by the depression of trade.

With the exception of a slight rise in April, May, and June in Exchange.
1893, exchange has steadily fallen from 31½*d.* to 27½*d.* in December,
showing an average during the year (bank rates) of 30¼*d.* to the
1 dol. at 60 days' usance on London and 64½ per cent. premium
on sight drafts on New York.

This fall has since continued, having touched 26*d.* on London
and 90 per cent. on New York in January, 1894, and in February
(1714)

24½*d.* on London and 102 per cent. on New York with no prospects of improvement.

On these low rates little or no transactions have been done and business is at a standstill.

Depression of
trade.

Although the crops of 1893 were good, the effects of former bad harvests are still felt in the country, and the necessities of life have increased in price and are daily increasing. Thus the consumer is not in a position to meet the difference of exchange on foreign importations, the duties on some of which are over 100 per cent. *ad valorem*, and is driven to the consumption of home made articles which, without protection, could not compete with importations, even at a low value of silver.

This serious state of affairs has rendered it necessary for importers to withhold orders and to practise the greatest economy, there being considerable stocks on hand that have yet to be debited with the difference of exchange, for in 1891, on rumours of higher duties, large shipments were received and present stocks consist chiefly of those imported during that year and 1892, when exchange on London was 37½*d.* and 33½*d.* to the 1 *dol.* In some instances these purchases were made on credits of from 6 to 10 months, which have since been extended to suit the market.

As profitable sales of protected articles could not be effected on the basis of such low and uncertain exchange, merchants who could afford to wait declined to part with their goods, whilst others less fortunate were compelled to sell these stocks at the usual prices, for the public would not buy on calculating the difference of exchange.

Thus, these houses have sold at the old rates, which, although they show a profit in dollars on account of the fall in silver, yet the intrinsic value results in an actual loss when the profit has to be accounted for in gold, and should credits be met at a higher rate than when the goods were purchased, the deficit would be seriously increased.

There is, however, an increased tendency towards cash purchases, and Mexican coin has been shipped, sold to arrive.

Sales to retailers are made on credits of from 6 to 8 months' credit at 1 per cent. per month interest.

On existing duties foreign cottons might be able to compete with native production, provided exchange were not greater than 35 per cent., but as profits are cut down to the lowest limits this would necessitate long credits and would entail serious risks, as a slight difference in exchange might result in a heavy loss. The low value of silver has brought exchange to represent even 100 per cent.

Business in Vera Cruz depends to a great extent on commission, and mercantile houses that import for the local market are in a better position than in the capital, where there is greater competition and railroad freights have to be taken into account, and where it is possible for business to be done, local trade shows a tendency to return to the port.

Merchants are now waiting with anxiety a solution of the silver question, meanwhile unless artificial impediments to fair competition with home made goods are modified, the import trade of the country will continue to diminish, not only to the detriment of foreign manufacturers, but at a loss to the revenue of the country and at the expense of the consumer, who will be constrained to purchase goods manufactured in the country from imported raw material, at a cost far exceeding that for which the same goods could be imported.

Orizaba, in the State of Vera Cruz, is one of the principal manufacturing centres of the Republic, the factories for the most part being owned by foreigners and representing foreign capital. Home manufactures.

Here will be found some of the finest English-made machinery ; Cotton factories.
and cotton prints are now turned out as good, if not superior, to the imported article.

The production of these mills has been affected by the great difference in exchange ; sales have increased considerably during the last 3 years, whilst profits have been very fair, although this business has also suffered from the general depression of trade throughout the country.

Some of the shares of cotton factories in Mexico are at from 60 per cent. to 80 per cent. premium.

Until quite lately, these mills used entirely imported raw material, the raw cotton of the country being mostly produced in the interior at a greater cost than in the United States, and the spinning being defective.

The fall in silver has, however, caused more attention to be given to this article, and the factories at Orizaba are now using home-grown cotton as much as possible, in some instances the spinning being half-and-half.

The flourishing condition under protection of the manufacturing industries of the country has attracted attention for purposes of revenue, and cotton mills are now taxed, some 8 per cent. on sales. Since the imposition of this tax the trade of the cotton mills has decreased, probably owing principally to buyers of these products having previously laid in large stocks at low prices.

In the course of a few months a large jute factory, fitted with the best English-made machinery, will be opened at Orizaba. Jute factory
Attempts to grow jute in the country have so far not been successful, and the use of other fibre in its place is still an experiment. Thus the raw material from India will have to be used, and jute goods will be manufactured at a greater cost than that for which they could be imported. These conditions debar competition, but it is to be feared that recourse will be had to protection, and that heavy duties will be imposed on importations of jute goods.

The effect of protection in Mexico has produced an anomaly. Protection.
The country is capable of producing raw material for export, representing gold value, and of importing manufactured goods to its own advantage even at the present low value of silver. Instead of this, investments of capital and energy into artificial channels
(1714)

has been encouraged by protection, with the result that importations have decreased, entailing a consequent loss of revenue to the Government and higher prices to the consumer, whilst the profits are gathered in by the manufacturers, who for the most part are foreign capitalists.

And now, as these industries are taxed in their turn, the consumer will have to pay still higher for the necessities of life which will tend to reduce consumption to the lowest ebb.

Imports.

The returns of importations for the years 1891-93 are not yet obtainable from the Vera Cruz customs-house, consequently only an approximate comparison can be arrived at by reference to the customs receipts given to the public, though unfortunately those for July, 1893, were not published. As, however, these receipts show a steady falling-off during last year, with the exception of June and August, which showed a very slight increase over those months of the preceding year, it may, perhaps, be permitted to take the receipts for July, 1893, as equal to those of July, 1892, as has been done in the following table:—

CUSTOMS Receipts at Vera Cruz during the Years 1890-93.

Year.						Amount.
						£
1890..	..	..	..	..	..	2,194,245
1891.	..	..	..	..	..	2,147,631
1892..	..	..	..	..	..	1,497,118
1893..	..	..	..	..	..	1,331,176

NOTE.—Converted at the rate of 7 dol. to the £l.

These receipts comprise import and export duties, fines, outstanding accounts, port dues, and other items. The tariff of 1891 may be said to have reduced the duties by some 10 per cent.

Decrease.

No doubt a certain amount of local freight for Tampico has been diverted from Vera Cruz by the improvement of that port and the development of its railway communication with the interior, but the amount of freight thus lost can never be of much account seeing that competition in through freights to Mexico must necessarily fail, whilst the mileage by rail from Tampico to the capital is so far in excess of that from Vera Cruz.

Again, railroads may have attracted a certain amount of the raw cotton and coal from the United States.

The bulk of imports, however, through Vera Cruz come from Europe, and of this, in 1890, some 31½ per cent. consisted of cottons, linens and woollens, which are now unable to keep their footing in Mexico through lack of fair competition.

It is evident that importations through Vera Cruz have steadily diminished since 1890, and will show a marked decrease

in 1893, caused through the decline in the value of silver and the protection afforded to home made goods by excessive duties.

Reference to the Board of Trade returns will show that exports from England to Mexico have fallen off.

Unless existing causes are modified the import trade of 1894 will be still further reduced.

The annexed table A gives the exports through Vera Cruz Exports. from January to December, 1893.

This shows an increase over 1892 of 9,639 tons, representing Increase. 711,109*l*. This does not include mineral ores, which show an increase of 105,460*l*. Gold coin shows an increase of 6,316*l*. Other precious metals show the following decrease :—

Description.					Amount.
					£
Gold bullion	..	..	..	..	15,857
Silver bullion	..	..	..	..	43,286
Silver coin ..	..	..	..	..	424,075

NOTE.—For purposes of comparison a universal rate of 7 dol. to the *l*. has been used.

The amount of coffee exported in 1893 has nearly doubled, Coffee. showing an increase over the preceding year of 6,743 tons and 647,184*l*. The bulk of this coffee goes to the United States, and prices have steadily risen.

Prices at place of production in 1892 ranged from 22 c. per lb. to Prices 26 c. per lb., and in 1893 from 20 c. per lb. to 31 c. per lb. Quotations for January, 1894, being from 31 c. per lb. to 32 c. per lb. with a tendency to rise. Washed coffee commands 2 c. per lb. more.

The crops are gathered from December to April, according to Crops. locality. That of 1892 was small, whilst the crop of 1893 was good; 1894 crop gives promise to be of fair average.

The high price of coffee and the low value of silver has Speculation. given rise to considerable speculation both in the berry and in lands. The future of Mexican coffee depends on that of coffee in general; but is, perhaps, more directly in competition with the Brazilian crops, and the success of recent plantings depends on the outlook some 3 years or 4 years hence.

At present plantations in bearing are yielding from 200 per Recent cent. to 250 per cent. profit on actual yearly expenses, and new plantings. plantings have been extensive all over the country; but as planters are taxed on a calculated yield, no reliable statistics of the extent of lands recently brought under cultivation could be obtained except through Government enquiry.

Both the manufactured and the raw material show a falling-Tobacco. off, these exports, no doubt, being influenced by the general depressed state of trade in Europe, and the inferior quality of the Mexican crop for 1893, which, however, was abundant. At

the same time, manufactured tobacco to England has increased. The cultivation of tobacco is increasing, and the home market can always be relied on to absorb a large supply. Exports, however, depend on good class tobaccos, and much depends on improvement in their cultivation. Mexico produces good tobacco, and no doubt there are yet uncleared lands from which better results could be obtained.

Broom-root.
Rubber.

Broom-root shows a slight falling-off; as also rubber, though this latter forms but an insignificant item in the returns; whilst remaining articles mentioned in the returns show an increase in the amount of tons exported.

Vanilla.

Vanilla, which grows wild in the State of Vera Cruz, is not cultivated to any great extent, and as the crops suffer through want of irrigation an increase in this product is not expected.

Lands.

Intending purchasers of Government lands should obtain information direct from the federal Government in the capital. It is necessary, both with regard to Government and private lands, to visit the locality before concluding a purchase. This entails considerable expense, time, and trouble, for in many of the districts means of communication are defective, roads bad, population sparse, and resources for travellers scarce and primitive.

The greatest caution is required with regard to titles, on which subject local information and legal advice are indispensable.

Land has greatly increased in value in the last few years, and in the State of Vera Cruz is principally held in large tracts by owners who cultivate but a small percentage of their property, and who are with difficulty induced to part with any portion.

Prices.

The prices at which Government lands are quoted in the following States are given below:—

State.	Currency.		Sterling.*
	Per Hectare.	Per Acre.	Per Acre.
	Dol. c.	Dol. c.	s. d.
Vera Cruz	2 75	1 9	2 8
Campeche	1 65	0 65	1 7
Tabasco	2 0	0 79	1 11
Yucatan	1 65	0 65	1 7

* Exchange calculated at the rate of 8 dol. to the £1.

Suitable lands for coffee in accessible and healthy districts are difficult to obtain at present, except at fancy prices; whilst uncleared lands, not Government property, on the south coast of Vera Cruz, may be purchased at 3 dol. the hectare, equal to 1 dol. 19 c. (2s. 11d.) the acre.

In noting these prices, and the rate of conversion into sterling, it should be borne in mind that prices are rising, and that considering the uncertainty and fluctuation of exchange it is difficult to find a correct average rate.

There has of late been considerable speculation in lands, but few purchases have been made for actual occupation. Speculation.

On the south coast the slopes and higher portions are suitable for coffee, whilst the lower lands, abundant in fertility, are open to the cultivation of a great variety of tropical produce. It is in these regions where much of the tobacco of the country is grown. Coast lands.

An abundant means of water supply and a natural outlet to the coast is afforded by a network of rivers. A great portion of these lands, however, are only suitable to periodical cultivation, being subject to inundation through the abundant rains that produce freshets in their descent from the watershed of the Cordillera.

This region is as yet but sparsely populated, and, although its natural resources are numerous and varied, its development requires the expenditure of both capital and energy.

Valuable lands are to be found on the isthmus of Tehuantepec and on the borders of the Coatzacoalcos and Usapamapa Rivers. Some of these, however, are subject to inundation.

Again, to the north of Vera Cruz there are many lands suitable to cultivation only waiting development.

The port of Coatzacoalcos is the Gulf terminus of the Tehuantepec trans-continental railroad across the isthmus to Salina Cruz, which will be completed in a few months, and Coatzacoalcos is destined to be the principal port on the Gulf coast. Means of communication.
Coatzacoalcos Port.

It is situated at the mouth of the river of the same name, and is naturally a safe and extensive harbour for vessels of large tonnage. The bar at the mouth of the river does not change, there being always 12 feet of water on it, and sometimes 14 feet. It is composed of hard clay, and there would be no difficulty in cutting a channel through this bar. On entering the river there are from 5 to 7 fathoms of water, with plenty of room for large vessels to turn. On one bank of the river there are 4 to 5 fathoms of water alongside. The current of the river is not strong except during floods, when it is about 4 or 5 knots.

Coatzacoalcos River is navigable to Minatitlan (25 miles) to vessels of 16 feet draught, and 30 miles to vessels of 12 feet draught. River boats of from 1 foot to 1½ feet draught can go as far as Xuchil, 100 miles above Minatitlan. The Coatzacoalcos spreads in the rainy season, and requires careful navigation to keep the channel and to avoid shoals above Minatitlan. Coatzacoalcos River.

The Usapamapa River joins the Coatzacoalcos 6 miles below Minatitlan, and is navigable for 30 miles to vessels of from 10 to 12 feet draught. This river, which is not broad, has the advantage of being confined between steep banks, and offers a clean and easy channel for navigation. Usapamapa River.

Alvarado is connected by rail with Vera Cruz. Petitions have already been made to open the port to foreign trade, but, until the country is developed, this is not likely to be conceded. It is, however, capable of being made a good port, though the bar at Alvarado Port.

the mouth of the River Alvarado is a drawback, the depth of water changing from 18 feet to 6 feet. On crossing the bar the river is full of shoals, and opens out into extensive lagoons.

Papaloapan
and San Juan
Rivers.

The Alvarado River is principally the mouth of the Papaloapan, which, with its tributaries, the San Juan, Tesehoacán, and other minor rivers, offer facilities for navigation to the interior that have already received attention, and a company formed for this purpose has lately established a weekly service in small steamboats between Alvarado and the principal centres some 200 miles up the Papaloapan and San Juan. Produce is brought to the coast by these waterways even from the State of Oaxaca by means of canoes and rafts.

River
navigation.

The Papaloapan is navigable to vessels of from 16 to 18 feet draught as far as Tlacotalpan, and to vessels of 5 feet draught as far as Cosamaloapan or Chacaltianguiz.

Tuxpam Port.

Means of communication are being improved from the port of Tuxpam with Tampico by water and rail, and a railroad is also in construction from thence to Tecolutla on the coast, which is to connect with the capital through the Hidalgo railroad. This port will increase in importance as the interior is developed, but unfortunately there is a bar at the mouth of the river which has only some 4 to 6 feet of water.

Nantla Port.

Nantla is not an open port, but the railroad building from San Marcos on the Mexican line to this port will make it of importance.

Labour.

The supply of labour is a question of the utmost importance in the selection of land for cultivation. In Mexico it is principally concentrated in the healthy districts, whilst in the hot regions of the coast, where lands are unreclaimed and population sparse, labour has to be obtained through the local authorities, which entails cost of transportation and loss through advances and other risks.

Wages.

Agricultural labour in Mexico is scarce; it is chiefly Indian and of a low class, adverse to the employment of other methods of cultivation than those to which it is accustomed. Wages are low, but must rise if left in liberty to be governed by the natural causes of supply and demand and the daily increasing cost of the necessities of life.

In the State of Vera Cruz wages are from 25 c. to 63 c. per day—say from 7d. to 1s. 6d., and it would be difficult to find foreign labour that could compete with these rates. So far little has been done to induce immigration, and it has been suggested that the better scheme is to transport labour from the poorer parts of the Republic where there is considerable distress to places where labour is scarce. It is, however, questionable how far, if at all, the distress referred to is consequent to congestion.

The Indian is devoid of all ambition, and through lack of energy limits his days of work to sufficient to enable him to live for a time in idleness on the proceeds. This, perhaps, is one of the causes of a system of treating labour to be found in several parts of the Republic, by which the Indian is reduced to a hope-

less state of indebtedness to his employer through advances in food, clothing, and other necessities at exorbitant rates which he is called on to pay for in labour.

In some localities employment is rendered precarious where it is the custom for agriculturists to concentrate their energies to the cultivation of one particular product requiring only periodical labour.

These conditions are conducive to a state of mistrust on the part of the Indian, who, as a free agent, it is hard to induce to leave his native place and to place himself in the power of his employer and under the influence of a climate which, in many cases, he is unable to resist, for the natives of the high lands in the interior do not thrive on the coast.

The agricultural future of the country greatly depends on the facilities to be accorded to the introduction of foreign energy and enterprise, capable and willing to sink capital in the land, and to open a market for higher class labour, on which more dependence could be placed, and from which greater returns would result. Agricultural future.

The depression of trade and the decrease in importations has been detrimental to the railroads in the Republic, whilst the improvement in the crops and the impetus given to exports by the fall in silver has had a contrary effect. Railroads.

The lines from the coast owe their existence to foreign trade, and are now benefiting by the increase of local traffic in the country they have helped to develop. Local freights have increased, and in the last few months down freights for export have been heavy, with good prospects for the future. Local freights.

Competition in the carriage of foreign goods was modified in 1892 by pooling arrangements between the Mexican, Interoceanic, Central, and National Railroad Companies, and these arrangements are to remain in force until September next.

The Mexican Railroad Company has given further facilities to local passenger traffic by an extra train service between Vera Cruz and Orizaba. Through passengers arriving at Vera Cruz are able to leave the same day at 1.30 P.M. for Orizaba by the Mexican line, or for Jalapa by the Interoceanic. The ordinary through train to the capital by the Mexican line leaves Vera Cruz at 6.15 A.M. Mexican line.

The mule tram line from Vera Cruz to Jalapa has been removed, it being unable to exist in competition with the Inter-oceanic railroad. Jalapa tram line.

The Tehuantepec railroad from Coatzacoalcas to Salina Cruz is some 200 miles long, of which there are about 30 miles yet unfinished. It is expected that this line will be concluded by September next. Tehuantepec railroad.

This line across the isthmus of Tehuantepec will offer a shorter route to many parts of the world to goods in transit, and will eventually divert a considerable amount of freight from other routes. It cannot, however, expect to compete effectively unless

it is provided with sufficiently good ports at either terminus. Coatzacoalcas, on the Gulf side, can easily be converted into a commodious port with all the requirements necessary for a large amount of shipping, but Salina Cruz on the Pacific is only an open roadstead exposed to the constant heavy swell that will be found to greatly impede the shipment of goods, and it does not seem practicable to make of this place a sufficiently convenient port for the ends required, and to be able to compete with Panama.

Public works.
Vera Cruz
port works.

The construction of the sea-wall for the protection of Vera Cruz harbour from the heavy sea that during the winter months has so constantly impeded the work in the bay, is progressing. The foundations of the outside casing of the wall, which is to stretch from the shore to the island of Ulna across the north passage, is almost completed, but the coping which had been built over the greater portion of it has been nearly all destroyed by the violence of the waves. Up to date some 180 metres of the foundation of the inside casing or wall have been laid, and only require two tiers of blocks to be completed below the coping. Sand that is being now dredged from the bay is being deposited between these two casings to fill in the wall.

Improved
weather
working days.

It is satisfactory to be able to state that a return is already apparent for all the capital and labour expended on this enterprise, and that vessels are now able to discharge during weather which not very long ago would have stopped all communication with the shore, and that as the work proceeds weather working days in Vera Cruz increase.

Silting of
sand.

The silting of the sand in the bay in consequence of the stoppage of the north passage is, however, a serious question. This evil was not unforeseen, and perhaps its consequences have not been so serious as were predicted, yet unless preventive measures are taken in time much damage may be expected.

The sand seems so far to have collected to the southward, and to be threatening the customs pier. In fact, the shoal water at the piers is often the cause of stopping work, for during weather in which lighters can take in cargo from the ships they are often prevented from going alongside the piers on account of broken water and want of depth.

In January, 1893, a hopper dredger and sand pump of 202 tons register, capable of dredging 200 tons per hour, and of carrying 300 tons in her deposit, arrived in the bay, but owing to some unexplained cause her work has been confined to trials since her arrival. This dredger if kept in daily employment could do good work towards keeping the bay clear, but every day neglected will render this task more arduous in the future. Quite recently this dredger has commenced constant work, and is to be supplemented by another. Meanwhile the passage left in the breakwater for the current to pass is going to be blocked to prevent sand from entering from the north.

Floating dock.

A floating dock, capable of raising vessels of 2,000 tons is being brought from France to be placed under the lee of Ulna, and it is expected it will be ready by September next.

The Government arsenal has been moved from Tabasco to Arsenal. Ulna, and workshops, foundries, steam cranes, &c., are being erected within the walls of that fortress.

These works, together with the dock, will be of the greatest advantage to shipping, and will enable vessels to clean and repair ships. Repairs to in the port of Vera Cruz.

The square in front of the customs-house, where certain Custom-goods are deposited awaiting despatch, has been enclosed by wire house. fencing, and other precautions have been taken to guard against robbery. Tenders have been called for to erect iron shelters for these goods, which are now exposed to the weather.

The scheme for the more effective lighting of this port and Lighthouses. the Gulf Coast is progressing.

The new lighthouse on the island of Enmedio was lighted on Enmedio September 1 last. A whistling buoy has been placed on Lavandera light. reef and a bell-buoy on the Pajaros reef. A new lighthouse has Buoy. been erected at Progreso, and the small port of Celestum has also Progreso light. been supplied with a light. Celestum light.

From April 2, 1894, the light on the Island of San Juan de Ulna, which has a radius of 14 miles, will be discontinued, and Ulna light. the new position lights, that of Sacrificios and the one over the Vera Cruz position entrance to the customs-house pier at the Vera Cruz, will be lights. lighted.

A lighthouse is to be erected on the Santiaguillo island, Proposed new which will guard against the Anegada de Afuera and other reefs. lights. Lobos island is also to be supplied with a light.

Table B gives the shipping returns for the last year, and Shipping. shows a decrease of 51 vessels and 41,968 tons entering Vera Cruz as compared with the preceding year.

The following table comparing the tonnage according to nationality entering this port during the last 2 years, shows that British shipping has not suffered, whilst tonnage under the French flag has decreased, owing to a great extent to the fact that the Compagnie Commercial de Transport have withdrawn their service from this port. The tonnage under the United States flag shows a slight decrease, whilst that of other nationalities has slightly increased. The tonnage of the coasting trade shows a tendency to increase.

PERCENTAGE of Tonnage, according to Nationality, entering Vera Cruz during the Years 1893-92.

Nationality.	Percentage.	
	1893.	1892.
British	25·33	25·56
French	5·77	11·36
German	9·11	5·75
Spanish	18·53	17·22
United States	24·69	25·38
Other countries	0·91	0·52
Mexican coasting	15·66	14·21

The number of vessels is compared in the following table:—

NUMBER of Vessels, according to Nationality, entering Vera Cruz during the Years 1893-92.

Nationality.	Number of Vessels.	
	1893.	1892.
British	87	99
French	16	29
German	27	31
Spanish	35	35
United States	84	102
Other countries	10	8
Mexican, coasting	288	294
Total	547	598

This shows that, with the exception of Spanish vessels, the number of those under other nationalities has decreased to the total of 51 vessels.

Health.

In taking the population of the port of Vera Cruz as 29,000, it should be borne in mind that the hospitals are also used by people from the outlying villages and districts.

The death rate in this port during 1893 from yellow fever was 4·51 per thousand, and the total death rate 48·11 per thousand.

Table A.—Return of the Principal Articles of Export from Vera Cruz during the Year 1893.

Articles.	England.		Germany.		France.		United States.		Spain.		Other Countries.		Total.	
	Quantity.	Value.	Quantity.	Value.	Quantity.	Value.	Quantity.	Value.	Quantity.	Value.	Quantity.	Value.	Quantity.	Value.
Coffee ...	Tons.	£	Tons.	£	Tons.	£	Tons.	£	Tons.	£	Tons.	£	Tons.	£
Tobacco—	44	2,410	27	1,812	216	19,990	14,657	1,059,695	108	6,101	6	371	15,068	1,120,279
Manufactured	315	84,226	2	657	16	3,393	8	3,557	(Fraction)	168	1	223	342	92,523
Raw	86	7,879	627	55,193	2	2,760	105	10,296	...	...	180	14,340	1,000	90,468
Rubber ...	10	3,252	982	36,895	1,266	33,232	1,309	16,212	(Fraction)	...	...	...	2,566	91,773
Hides and skins	16	1,440	137	1,652	137	1,652	2,725	32,441	(Fraction)	2,182	...	...	1,410	103,440
Marble	73	437	69	619	137	1,652	2,725	32,441	(Fraction)	7	...	...	3,016	35,293
Beans and peas	...	...	(Fraction)	12	19	2,437	173	2,742	(Fraction)	30,088	2	38	2,410	33,092
Vanilla	1	2,656	...	284	1	2,437	43	71,780	2	23,290	...	...	52	100,387
Chick ...	...	...	...	...	...	...	117	10,949	(Fraction)	...	...	...	117	10,951
Mahogany and other woods	813	2,668	...	...	...	...	1,576	4,785	...	...	103	350	2,492	7,803
Dyewoods	1,684	5,539	635	1,691	1,090	4,041	1,258	3,333	...	...	...	...	4,567	16,104
Jalap ...	11	547	33	2,686	8	200	51	2,223	...	...	...	...	103	6,257
Sugar ...	411	7,778	...	...	...	...	42	1,709	(Fraction)	...	...	...	453	9,495
Rubber ...	(Fraction)	...	...	...	...	...	20	2,211	...	...	...	...	20	2,336
Miscellaneous	42	2,181	163	3,456	53	6,550	491	8,979	...	4,591	1	...	908	25,922
Total	3,404	117,979	2,604	105,067	2,954	83,824	23,689	1,333,775	2,608	66,484	305	15,482	34,564	1,711,711
Mineral ores ...	...	121,085	...	123,177	...	30,186	...	60,639	...	...	...	...	...	341,087
Gold bullion ...	...	8,892	...	...	...	9,574	...	3,568	...	...	...	...	...	22,134
Silver bullion	...	28,274	...	1,443	...	15,716	...	21,409	...	...	...	...	...	63,842
Gold coin	...	8,892	...	...	...	9,574	...	3,568	...	...	...	...	...	22,134
Silver coin	...	585,570	...	...	...	224,045	...	190,500	...	1,876	...	...	...	1,015,994
Grand total	...	870,792	...	235,687	...	383,122	...	1,603,459	...	68,360	...	15,482	...	3,176,902

NOTE.—Exchange calculated at 8 dol. to the 17.

Table B.—RETURN of all Shipping at the Port of Vera Cruz during the Year 1893.

ENTERED.

Nationality.	Sailing.		Steam.		Total.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.
British	4	1,450	83	118,698	87	120,148
French	1	294	15	27,155	16	27,449
German	3	1,027	24	42,417	27	43,444
Spanish	...	...	35	87,925	35	87,925
American	30	10,324	34	106,367	64	116,691
Other countries ...	9	4,346	1	338	10	4,684
Mexican, coasting	100	13,336	179	61,063	298	74,399
Total	156	30,477	391	443,703	547	474,180
„ for the year preceding ...	185	31,528	413	484,020	598	516,148

CLEARED.

Nationality.	Sailing.		Steam.		Total.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.
British	3	1,179	83	120,898	86	122,077
French	1	294	15	27,350	16	27,644
German	3	1,027	23	40,381	26	41,408
Spanish	...	...	33	74,275	33	74,275
American	32	10,421	52	110,579	84	120,999
Other countries ...	8	3,945	1	338	9	4,283
Mexican, coasting	104	17,428	172	57,321	276	74,649
Total	151	34,294	379	430,933	530	465,227
„ for the year preceding ...	181	30,455	402	471,465	583	501,920

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ON THE

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1254. Smyrna	1d.	1312. Mozambique	1d.
1255. Yokohama	1½d.	1313. Odesa	1½d.
1256. Stockholm	1½d.	1314. Honduras	2½d.
1257. Lisbon	1½d.	1315. Batoum	4d.
1258. Tientsin	1d.	1316. Quilimane	1d.
1259. Port Said	1d.	1317. Copenhagen.. ..	1d.
1260. Hiogo and Osaka	2½d.	1318. Lima	1d.
1261. Damascus	1d.	1319. New York	1d.
1262. Samoa	½d.	1320. Baghdad and Bussorah	1d.
1263. Rio Grande do Sul	2½d.	1321. Rio de Janeiro	3d.
1264. Jeddah	1d.	1322. Réunion	3½d.
1265. Vienna	3d.	1323. Berne	1d.
1266. Shanghai	3d.	1324. Kiukiang	½d.
1267. Bangkok	1½d.	1325. Reast	3½d.
1268. Meshed	1½d.	1326. Florence	1d.
1269. Cadiz.. ..	2d.	1327. Hakodate	1d.
1270. Cherbourg	1d.	1328. Paris.. ..	2d.
1271. Erzeroum	½d.	1329. Paramaribo.. ..	1½d.
1272. Christiania	5d.	1330. St. Petersburg	2½d.
1273. Buda-Pesth	½d.	1331. Patras	1½d.
1274. New York	3d.	1332. Calais	2d.
1275. St. Petersburg	7½d.	1333. Loanda	1d.
1276. Alexandria	1½d.	1334. Bordeaux	2½d.
1277. Tokio	2½d.	1335. Taganrog	1d.
1278. Bilbao	3½d.	1336. Galveston	8½d.
1279. Beyrout	6d.	1337. Riga	2d.

No. 1338.

Reference to previous Report, Annual Series No. 1190.

NETHERLANDS.

BATAVIA.

Acting-Consul Fraser to the Earl of Rosebery.

My Lord, *Batavia, February 15, 1894.*
I HAVE the honour to hand your Lordship herewith my Report
on the Trade, Commerce, and General Matters relating to the
Island of Java for the year 1893.

I have, &c.
(Signed) DUNCAN D. FRASER.

*Report on the Trade, Commerce, and General Matters of the Island
of Java for the Year 1893.*

ABSTRACT of Contents.

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The financial condition of this colony at the close of last year, as measured by the export of its staple products, may be considered as fairly satisfactory, for although the coffee crop has proved an abnormally small one, as foreshadowed by last year's report, the statistics of the sugar yield throughout the Island throw all previous figures into the shade, while the results of other branches of agricultural enterprise compare favourably with those of former years.

It cannot be said, however, that the twelvemonth has been a prosperous one for those interested in the various classes of cotton goods, whether English or foreign, which form the largest item in our list of imports, prices having ranged on a low level and demand having been, especially during the second half of the year, extremely slack.

Sugar.

Last season's crop has been the largest on record, as the following figures will show:—

				Yield.		
				1891.	1892.	1893.
				Tons.	Tons.	Tons.
West Java	..	..	..	69,377	73,420	83,299
Mid "	..	..	..	106,078	111,184	125,549
East "	..	..	..	224,459	281,912	270,651
Total	..	..	..	399,914	416,516	479,599

(These figures are exclusive of molasses or syrup sugars.) The outturn of 1893 exceeded that of 1892 by about 13 per cent., and that of 1891 by about 16½ per cent. Four new factories commenced work, two of which in Mid Java and two in East Java, while a great many extended their plantations. The "serch" disease, the great enemy of the sugar-cane, seems to be gradually working its way from west to east of the Island, but would appear to be everywhere giving way before the superior methods of cultivation bestowed on the districts affected by it. As regards its influence on the cane production in East Java, Mr. Vice-Consul Warren writes: "The 'serch' disease extended itself to a slight extent, and the quality of the cane-fields was only maintained by a further greatly increased importation of 'bibiet' (plant cane) from hill nurseries and a free use of artificial manures. At the moment of writing I am informed that in some districts where rains were late an increase of 'serch' is reported, but in general the fields look well, and the crop is not expected to be below last year's."

The somewhat heavy expenses entailed by the heavy manuring above referred to, and by the other methods now generally adopted for securing superior cane, have been in some measure compensated for by the high sugar prices which ruled during

the whole of last season, the market for head sugars having opened at 9 guilders first cost per picul, and having touched 10 guilders per picul towards the close of the season.

Prospects for the coming crop are fair and the yield is expected to be a good one.

The Government have renewed the export duty from January 1, 1894, which will now definitely take the place of the provisional tax alluded to in last year's report. As, however, this provisional tax affected all sugars of last year's crop, of which more than 100,000 tons were still unshipped at the close of 1893, efforts are being made to obtain a remission of the duty on these sugars, which will otherwise have been doubly taxed.

Up to December 31 the exports of the 1893 crop were :—

Country.	Quantity.	
	1893.	1892.
	Tons.	Tons.
To Europe	211,468	117,548
Australia	35,273	40,800
China	78,884	52,213
America	15,073	89,792
Sundries	19,980	17,162
Total	360,678	317,515

Annexed Table 1 shows the total exports of the 1892-93 crop, as compared with former years.

The unfavourable predictions expressed in last year's report ^{Coffee.} with regard to the probable outturn of the 1893 crop have been more than justified, the total production from private and Government lands having been only 9,700 tons and 9,000 tons respectively, as against 21,500 tons and 42,000 tons in 1892. The coming crop, however, promises to be a much larger one, a good number of young estates bringing for the first time a fair amount of produce on the market. Present estimates for private estates show an aggregate of about 32,000 tons. The Government crop will only be a moderate one, say about 20,000 tons. A noticeable feature is the steady extension of the cultivation of the Liberian bean, which has hitherto commanded good prices in the European markets. It is feared, however, that when exported on a larger scale a fall in value, as compared with that of the Java bean, will take place.

Annexed Tables 2 and 3 show the prices obtained at auction for the Java and Padang Government coffee sold in the colony.

The production last year was somewhat smaller than in the ^{Tea} preceding twelvemonths, exports amounting only to 8,791,960 lbs., as compared with 9,156,634 lbs. in 1892. Prices, however, ruled considerably higher, especially during the early part of the season, and results to planters were, therefore, more satisfactory.

Towards the close of the year values receded about 1*d.* per 1 lb., as compared with those current during the opening months. More than two-fifths of the total exports found their way this year to England, as compared with about one-third in 1892.

Tobacco.

The crop was an average one as regards quantity, but the quality, especially of scrubs as usually produced by the natives, has been very poor, in consequence of which prices in Europe ruled somewhat lower. The Bezoekie crop gathered quite at the end of the year is reported to be considerably above the average in quantity.

Rice.

Considerable imports from Saigon and Singapore took place in East Java, owing to the poor harvest at that end of the island. Owing to the plentiful rains in West and Mid Java the crop in these districts was a large one, and exports reached nearly 27,000 tons, as against only 18,000 tons in the previous twelve-months. Of this quantity, about 21,000 tons were sent to Holland, and about 4,500 tons to England.

Cocoa.

The cultivation of this tree, especially in Mid Java, is becoming more general every year, and in the event of the value of the article maintaining its present level in the home markets, it will no doubt prove a considerable source of income to European and native agriculturists.

Indigo.

Vice-Consul Bonhote reports on this product as follows:—"The yield during the past year was a fair one especially in Djoedjakarta and Soerakarta. In most north coast districts considerable damage was caused by insects, owing to which the crop did not come up to expectations. Prospects for the coming crop are unfavourable, most estates having again had to contend with the ravages of caterpillars, whilst much damage has been caused by floods in Soerakarta and the surrounding district." Prices showed some improvement on those of 1892.

Cinchona bark.

Production of this article appears to have now become greatly in excess of the consumption, and Java planters are seriously contemplating combining to decrease the quantity harvested, as the only effectual way of raising prices which have now reached a wholly unremunerative level. Owing to the disproportion now existing between supply and demand home manufacturers have been able to combine both for the purpose of reducing the prices paid for the bark and of raising their selling rates for the prepared drug. During 1893 the prices paid per kilogram unit in the Dutch market varied from 5 $\frac{7}{8}$ c. (1 $\frac{1}{2}$ *d.*) in January to 2 $\frac{1}{4}$ c. ($\frac{1}{2}$ *d.*) in August, a recovery of 1 $\frac{3}{8}$ c. ($\frac{1}{4}$ *d.*) taking place at the end of the year.

Coprah.

The cocoanut crop has again been a very poor one and prices of the oil have ruled exceptionally high. The prospects for the coming crop are, however, good, especially in the south coast districts, and it is expected that the manufacture of coprah will be resumed on an increased scale, especially in view of the China markets being closed for cocoanut oil owing to the unfavourable exchange.

Tin.

Prices for Billiton tin (vide Annex 4) have steadily receded

during the year under review, and close about 16 $\frac{1}{2}$ per ton under January values. To this state of affairs the decline in silver, owing to the repeal of the Sherman Act, has largely contributed by making imports of Straits tin in Europe possible at much reduced rates.

The shipment of Banca aggregated 7,054 tons, against 6,397 tons in 1892.

Imports.

The market for most European manufactures, although fairly brisk at the commencement of the year, became more and more depressed during its course owing to a continued absence of demand even at unremunerative rates. The abnormally small coffee crop and consequent straitened circumstances of the large portion of the population who are engaged in the cultivation of the Government gardens, may partially account for this unsatisfactory state of affairs, and doubtless matters will improve when the larger crop expected for next year has been gathered. Meantime, however, the year closes with a general feeling of uneasiness among import houses, which has been aggravated by the unusually large number of failures of Chinese dealers during the year.

The increase in the imports of sulphate of ammonia, noticed in my last report, has been maintained, and promises to grow still further. Sulphate of ammonia.

Petroleum was imported on an abnormally large scale, the total number of cases which passed the customs being 4,208,109, as against 3,064,626 in 1892, and 2,595,054 in 1891. Prices receded continuously during the twelvemonth, and closing rates were about the lowest ever touched. Stocks at the end of December were excessive, being 1,375,978 cases, as compared with 531,900 cases at the close of 1892, and 684,600 cases at the close of 1891. The Java production has so far not been much extended, but fresh boring operations are being undertaken in Mid Java, where new oil-bearing strata are said to have been discovered. As far as I can ascertain no further steps have been taken to carry out the scheme of importing foreign oils in tank steamers. From January 1, 1894, the excise has been increased from 1 fl. 75 c. to 2 fl. per hectolitre, the import duty of 25 c. per hectolitre remaining unchanged. Petroleum.

It still remains uncertain in how far the quality and cost of Coal. the Ombilioen and Koetei coals will enable them to compete in the open market with English and Australian kinds, late reports being somewhat unfavourable, especially as regards the former mine.

An excise duty of 40 c. per 6 cubic decimetres has been imposed on matches, to take effect from January 1, 1894. The quality of the matches manufactured at Samarang does not seem so far to answer expectations. Matches.

*Miscellaneous.***Exhibition.**

The Batavia Agricultural and Industrial Exhibition was opened on August 12 by His Excellency the Governor-General. From a financial point of view it has proved only moderately successful, the expenditure having been barely covered by the receipts. This must be mainly attributed to the unfavourable position of Batavia for attracting sightseers from other parts of the east, and to the fact that the period during which the exhibition was held (August to November) is the busiest season of the year for the greater part of the European population in Java, many having been prevented on this account from leaving their various vocations in other parts of the island to pay a visit to Batavia. Regarded as an exponent of the progress made in the many forms of industrial and agricultural enterprise in this archipelago, the exhibition may be said to have been a fairly representative one, and the promoters deserve considerable credit for the energy displayed in collecting and arranging the different exhibits. Among the objects of interest indigenous to the colony may be mentioned a very fine collection of the different sorts of timber found in the island, specimens of Chinese-made furniture and wood-carving; samples of the various qualities of coffee, tobacco, rice, and tea grown in the country; exhibits from the topographic and mining departments; and the artillery construction workshops at Sourabaya. A very fine collection of clothed figures or dolls was also on view, sent in from all parts of the archipelago, to illustrate the various costumes and peculiarities of dress of the natives. The collection is intended ultimately for presentation to Her Majesty the Queen of Holland. Among sundry exhibits representative of foreign industry were noticeable a display of electric lighting apparatus from the English firm of John Birch and Co., and another sent in by the German firm of engineers, Siemens and Halske. Various forms of portable tramways, and recent machinery for the pulping of coffee were also on view. The exhibition was closed on November 19 by His Excellency the Governor-General.

Mail service.

A new contract was closed by the Dutch Government with the Dutch Steam Navigation Companies "Nederland" and "Rotterdam Lloyd," for a period of 15 years for the carrying of mails between this colony and Holland. A fortnightly service by each company is stipulated for, while remuneration takes place on the terms settled by the Postal Convention, held at Vienna on July 4, 1891, with a minimum payment guaranteed per voyage of 2,400 guilders (200*l.*). The guaranteed time for the conveyance of the mails between Batavia and Marseilles or Genoa for the next 5 years, varies from 29 to 31 days according to the season, while the rates will thereafter have to be accelerated by 48 hours. The arrangement already existing with the above companies, under which they enjoy together with the P. and O. Steam Navigation Company and the Messageries Maritimes the sole right to convey Government passengers between Holland

and Java, has also been renewed for the same term as the mail contract.

A new contract was last year entered into by this company with the Government for a further term of 5 years, in virtue of which the company undertakes the shipment to and sale in Holland of all Government produce (coffee, tin, and cinchona bark) consigned to the mother country for a remuneration of $1\frac{1}{2}$ per cent. on the gross proceeds. Netherlands trading company.

It is expected that the communication with East Java via Tjilatjap will be completed in the latter half of 1894, the line having been opened from the Batavia end as far as Tasikwalaya at the close of last year. In the closing months of the year operations were commenced on a new line in East Java to connect Probolinggo and Panaroekan with a branch line to Pasirian, and another joining Malang with Blitar via Wlinggi. Railways.

During the year the Netherlands-Indian Government erected an additional telegraph line from one extremity of Java to the other, connecting Batavia with Sourabaya and Banjoewangie. This line has been placed at the disposal of the Eastern Extension Australasia and China Telegraph Company, and is now used for the transmission of international telegrams, especially for those passing through Java to and from the Australian Colonies. Telegraphs.

The submarine telegraph cable across the Straits of Sunda has been partially renewed and entirely relaid by the Netherlands Indian Government. A new route has been followed, which takes the cable clear of coral bottom, and this operation will, it is expected, render communication between the two great Islands of Java and Sumatra less liable to interruption.

Concessions were granted during 1893 for the laying down of telephonic wires at Buitenzorg, Tegal, Pekalongan, Kediri, and Soerakarta. Telephones.

The concession asked, as mentioned in last report, for the laying down of electric wires throughout Batavia has been granted for a term of 20 years. Electricity.

The term of office of the late Governor-General, Mr. Pynacker Hordyk, expired during the past year, his successor, Jonkheer C. H. A. Van der Wyck, was installed and entered on his vice-regal office on October 17. Executive Government.

No epidemics occurred during the year, the general health of the population being good. Health.

The number at Batavia at the close of the year was 70, at Samarang 29, and at Sourabaya 67. British residents.

Annex 1.—FROM July of the one Year to June of the following Year.

Country.	Sugar Crop.		
	1890-91.	1891-92.	1892-93.
	Tons.	Tons.	Tons.
Europe	194,571	215,431	161,132
Australia	32,185	43,410	42,878
China	79,450	98,558	105,978
America	83,114	60,789	97,503
Sundries	23,460	16,518	22,302
Total	412,780	439,705	436,813

Annex 2.—GOVERNMENT Java Coffee Sales during 1893.

Description.	Date of Sale.	Quantity.	Average
		Piculs.	Fl. ..
Preanger WIP	July 26	3,200	66 78
" OP	"	21,800	66 18
Kadoe	August 23.. .. .	10,000	60 94
Madioen	"	5,000	67 27
Cheribon	"	4,000	61 134
Preanger OP	"	2,000	66 224
Old Banjoemas	"	4,000	61 804
Sisir WIP	October 18	1,800	57 99
" interior	"	150	64 10
Karangan	"	64	70 0
Malangs OP	"	7,986	61 54
Preanger OP	"	11,600	59 85
" WIP	"	3,400	60 53
Old Preanger OP	November 22	3,000	66 77
" " WIP	"	4,600	59 94
" " WIP	"	400	59 974
Solo OP	"	2,600	53 8
Probolingo	"	4,000	60 53
Bangie	"	1,400	60 54
Sisir WIP	"	13	55 25
" interior	"	5	59 80
Karangan	"	16	65 15
Hand-pulped	"	137	58 30
Malangs OP	"	2,429	60 77
Tenger OP	"	6,400	59 73
Total .. .. .	.. .. .	100,000	.. .. .

NOTE.—16 $\frac{4}{10}$ piculs = 1 ton, and 12 fl. = 1/ sterling.

Annex 3.—GOVERNMENT Padang Coffee Sales during 1893.

Description.	Date of Sale.	Quantity.	Average.
		Piculs.	Fl. c.
Interiors	May 30	9,500	69 91
Ayer Bangies	"	130	74 30
Painan	"	1,470	65 59
Ankola	"	1,220	77 25
Mandheling	"	2,250	73 41
Liberia	"	2	46 20
" WIP	"	5	66 10
First quality	"	14,577	" ..
Second "	"	420	31 20
Interior	July 31	8,000	63 84
Ayer Bangies	"	270	72 85
" damaged	"	40	64 15
Painan	"	633	62 5
Ankola	"	630	74 40
Mandheling	"	1,700	75 0
First quality	"	11,273	" ..
Second "	"	410	35 75
Interior	October 17	13,800	64 28
Ayer Bangies	"	400	68 75
Painan	"	1,000	59 68
Ankola	"	1,375	70 27
Mandheling	"	1,600	73 40
Hand-pulped	"	9	63 10
Liberia	"	5	53 5
First quality	"	18,189	" ..
Second "	"	400	38 35
Interior	December 19	3,100	64 38
Ayer Bangies	"	150	65 90
Painan	"	200	59 50
Ankola	"	645	68 95
Mandheling	"	650	72 25
First quality	"	4,745	" ..
Second "	"	145	42 50

Annex 4.—RETURN showing the Prices obtained for Billiton Tin at the bi-monthly Auctions during the Year 1893.

Date.	Quantity.	Average Price.
	Piculs.	Fl. c.
February 22	16,017·80	63 46
April 19	16,733·13	62 52
June 28	14,041·79	59 8
August 30	13,016·38	55 3
October 25	13,020·21	54 95
December 20	13,051·56	52 9
Total	85,880·87	57 85

**Annex 5.—CUSTOMS Receipts in Java and Madura during
the Years 1892–93.**

Description.	Amount.			
	1892.		1893	
	Fl.	c.	Fl.	c.
Import duty	7,166,945	32	7,500,798	8
Export	769,328	22	993,399	35
Excise on spirituous liquors ..	202,106	69	167,244	69
" tobacco	26,316	68	85,279	24
" petroleum.. .. .	1,914,798	4	2,713,195	92
Store rent	52,863	94	41,949	5
Remuneration for services rendered ..	4,989	0	5,798	0
Fines and forfeitures.. .. .	5,924	74	3,714	24
Other receipts	24,692	2	23,877	63
Sales of unclaimed property.. .. .	1,251	65	948	15
Total	10,227,916	80	11,149,581	80
In 1891 the amount was				
1890	9,734,099	81	8,870,108	65

NOTE.—12 fl. = 1l.

**Annex 6.—RETURN of the Principal Articles of Export from
Java (including Madura) during the Years 1892–93.**

Articles.		1892		1893	
		Quantity	Value	Quantity	Value
			£		£
Sugar (all descriptions) .. Tons		437,625	5,166,444	474,940	6,187,480
Coffee					
Private		28,845	2,474,376	17,582	1,668,032
Government		19,096	1,694,670	14,396	1,267,840
Total		47,941	4,169,046	31,978	2,935,872
Rice		17,374	131,300	29,371	27,200
Arachis	Gallons	427,684	—	514,392	11,692
Indians	Tons	2,006	22,426	1,894	19,864
Indies	Lbs.	6,994,192	128,409	—	—
"	Pieces	—	—	197,000	—
Tobacco	Lbs.	48,762,608	—	38,696,428	744,640
Indigo	—	1,789,174	369,649	1,789,400	410,428
Gambier	Cwts.	20,749	30,614	18,857	46,638
Kapok	Lbs.	3,000,873	46,000	—	—
Tea	Packages	—	—	24,000	—
Tea	Lbs.	9,156,664	228,316	8,744,000	274,608
Opium					
Private		18,294,104	593,744	9,266,449	312,200
Government		14,430,325	268,283	15,861,004	561,580
Opium					
Private		6,446,246	—	7,468,756	—
Government		614,374	—	399,089	—
Nutmegs		46,004	—	178,000	—
Indies		50,000	4,628	60,000	6,867
Gambier		91,002	7,040	99,000	—
Mace		20,000	—	22,000	—
Pepper		12,000,802	111,088	8,434,000	67,927
Clonidine		2,941	—	25,000	—
Coconut		684,344	26,000	1,100,000	43,332
Opium	Tons	—	—	1,000	26,526
Opium	Lbs.	380,000	8,440	310,000	8,260
Opium	Tons	2,111	17,680	2,100	15,255
Opium	Lbs.	44,000	—	50,100	—
Opium	Cases	—	—	—	—

NOTE.—The quantities given above have been obtained from the returns of the principal articles of export from the Batavia Exchange. The values are merely approximate, and are based on the average values of the various articles during the year, no reliable statistics being published.

Annex 7.—Return of all Shipping at the Port of Batavia and Harbour of Tandjong Priok during the Year 1893.

Nationality.	Tandjong Priok Harbour.					
	Entered.			Cleared.		
	Steam.		Sailing.	Steam.		Sailing.
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.
Dutch ..	176	321,189.56	..	..	174	317,750.88
Netherlands-Indian ..	390	225,556.84	30	15,368.34	397	228,298.18
British ..	150	203,800.91	3	11,893.27	151	205,068.09
French ..	38	21,141.89	..	..	38	21,141.89
German ..	10	10,480.01	2	1,781.02	10	10,458.80
Norwegian ..	1	2,141.27	..	..	1	2,141.27
Italian ..	1	390.67	..	..	1	390.67
Austrian ..	..	..	..	..	..	..
American ..	..	..	..	..	..	..
Chinese ..	..	..	..	..	..	..
Japanese ..	1	1,359.00	..	..	..	..
Total ..	767	786,060.15	38	29,042.63	773	786,608.78
					38	26,414.35

RETURN of all Shipping at the Port of Batavia and Harbour of Tandjong Priok during the Year 1893—continued.

Nationality.	Batavia Harbour.					
	Entered.			Cleared.		
	Steam.		Sailing.	Steam.		Sailing.
	Number of Vessels.	Tons.	Number of Vessels. Tons.	Number of Vessels. Tons.	Number of Vessels. Tons.	Number of Vessels. Tons.
Dutch	..	..	11	..	..	12
Netherlands Indian ..	..	..	92	..	..	83
British	11	19,063.40	7	12	19,671.61	7
French	..	..	..	..	..	..
German	1	1,252.79	1	1	1,252.79	2
Norwegian	3	2,902.27	4	2	4,445.91	5
Italian	..	..	5	..	2,130.70	5
Austrian	1	2,130.70	..	1	..	..
American	..	..	2	..	..	2
Chinese	..	..	4	..	..	4
Japanese	..	..	..	..	..	..
Total	16	28,349.16	126	16	27,201.01	120
						46,691.87

RETURN of all Shipping at the Port of Batavia and Harbour of Tandjong Priok during the Year 1893—continued.

Nationality.	Total.					
	Entered.			Cleared.		
	Steam.		Sailing.	Steam.		Sailing.
	Number of Vessels.	Tons.	Number of Vessels. Tons.	Number of Vessels. Tons.	Number of Vessels. Tons.	Number of Vessels. Tons.
Dutch ..	176	321,189.56	11 13,514.31	174 317,750.88	12 13,986.30	12 13,986.30
Netherlands-Indian ..	390	225,556.84	122 30,856.38	397 228,238.18	113 29,815.18	113 29,815.18
British ..	161	222,684.31	13 18,558.62	163 224,784.70	12 14,371.64	12 14,371.64
French ..	38	21,141.89	..	38 21,141.89	..	..
German ..	11	11,752.80	3 3,193.21	11 11,711.59	4 3,050.23	4 3,050.23
Norwegian ..	4	2,043.54	4 2,381.64	3 6,287.18	6 4,158.74	6 4,158.74
Italian ..	1	390.67	5 4,143.76	1 390.67	5 5,123.86	5 5,123.86
Austrian ..	1	2,130.70	..	1 2,130.70	..	..
American ..	..	..	2 2,648.92	..	2 2,648.92	2 2,648.92
Chinese ..	..	..	4 150.95	..	4 150.95	4 150.95
Japanese ..	1	1,359.00	..	1 1,359.00	..	..
Total ..	783	814,409.31	164 75,453.09	789 813,85.79	158 73,105.82	158 73,105.82
„ for the year preceding	808	850,331.41	205 88,736.38	809 821,650.20	205 93,744.71	205 93,744.71
Difference ..	25	..	41 ..	20 ..	47 ..	47 ..

Annex 8.—RETURN of all Shipping at the Port of Sourabaya during the Year 1893.

ENTERED.

Nationality.	Steam.		Sailing.		Total.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.
British	241	272,408	18	23,711	259	296,119
Netherlands-Indian	361	223,422	156	34,739	517	258,161
Dutch	91	167,948	17	22,468	108	190,416
Austrian	2	3,626	...	...	2	3,626
German	27	27,452	6	7,070	33	34,522
Italian	1	390	6	7,672	7	8,062
Norwegian	8	13,706	3	1,953	11	15,659
French	...	...	1	435	1	435
Danish	...	...	1	600	1	600
American	...	...	1	1,418	1	1,418
Japanese	1	1,369	...	...	1	1,369
Total	732	710,221	209	100,906	941	811,126
„ for the year preceding	...	...	...	...	911	742,408

CLEARED.

Nationality.	Steam.		Sailing.		Total.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.
British	239	268,744	16	20,133	254	288,877
Netherlands-Indian	363	223,123	179	34,542	542	257,665
Dutch	94	172,880	20	25,643	114	198,523
Austrian	2	3,626	...	...	2	3,626
German	27	27,452	7	9,070	34	36,522
Italian	1	390	6	7,672	7	8,062
Norwegian	8	13,706	3	1,953	11	15,659
French	...	...	1	435	1	435
Danish	...	...	...	...	...	...
American	...	...	1	1,418	1	1,418
Japanese	1	1,369	...	...	1	1,369
Total	735	711,200	232	100,906	967	812,106
„ for the year preceding	...	...	...	...	912	766,193

Annex 9.—RETURN of all Shipping at the Port of Samarang during the Year 1893.

ENTERED.

Nationality.	Sailing.		Steam.		Total.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.
British	8	10,808	291	243,363	299	254,171
Netherlands-Indian	...	...	233	178,245	233	178,245
Dutch	10	13,672	137	232,354	147	246,026
Norwegian	7	5,113	41	18,000	48	23,113
Italian	8	10,475	...	...	8	10,475
German	7	8,953	7	7,683	14	16,636
French	1	465	12	9,814	13	10,279
Swedish	1	363	...	...	1	363
Japanese	...	...	1	1,369	1	1,369
Total	42	50,089	622	742,008	664	792,097
„ for the year preceding	...	...	...	...	688	640,357

CLEARED.

Nationality.	Sailing.		Steam.		Total.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.
British ...	8	10,838	200	242,642	208	253,480
Netherlands-Indian ...	...	...	232	169,415	232	169,415
Dutch ...	10	13,672	156	290,297	166	303,969
Norwegian ...	7	5,113	11	18,600	18	23,713
Italian ...	6	7,199	...	...	6	7,199
German ...	7	8,973	7	7,883	14	16,656
French ...	1	485	12	9,814	13	10,249
Swedish ...	1	503	...	...	1	503
Japanese ...	...	...	1	1,369	1	1,369
Total ...	40	46,733	619	739,820	659	786,553
„ for the year preceding ...	...	...	...	...	681	637,132

Annex 10.—RETURN of the Principal Articles of Import into Java (including Madura) during the Years 1892-93.

Articles.		1892.		1893.	
		Quantity.	Value.	Quantity.	Value.
Cotton goods (unbleached)—			£		£
Holland ...	...	...	394,006	...	315,046
England ...	...	...	124,911	...	111,560
Other countries ...	...	...	18,237	...	9,183
Cotton goods (bleached)—					
Holland ...	...	...	690,787	...	632,958
England ...	...	...	448,161	...	274,154
Other countries ...	...	...	13,833	...	15,276
Cotton goods (printed and coloured)—					
Holland ...	...	...	265,761	...	301,802
England ...	...	...	500,542	...	635,911
Other countries ...	...	...	42,985	...	46,730
Woollen goods—					
Holland ...	...	...	75,822	...	104,549
England ...	...	...	42,625	...	65,003
Other countries ...	...	...	20,700	...	22,482
Haberdashery and mercery	...	...	169,146	...	181,563
Provisions	...	...	361,253	...	342,584
Butter	Lbs.	404,875	...	327,305	...
Fish—					
Dried and salted	...	36,753,872	...	63,523,935	...
Unenumerated	...	...	78,057	...	14,575
Flour	Lbs.	16,946,794	135,354	16,779,880	...
Rice	Tons	78,448	...	99,942	...
Beer	Pints	2,043,574	...	2,238,660	...
Brandy	Gallons	105,554	...	102,520	...
Champagne	Bottles	53,842	...	53,497	...
Gin	Gallons	323,885	...	207,148	...
Liquors, spirits	Pints	128,792	...	145,678	...
Mineral waters	Bottles	1,232,964	...	1,261,749	...
Wine	Gallons	299,186	...	291,252	...
Copper, sheathing and plates	...	...	31,753	...	26,571
Coals—					
England ...	Tons	95,246	...	76,175	...
Australia ...	...	15,226	...	24,658	...
Other countries ...	...	8,014	...	8,361	...
Earthenware	...	...	118,492	...	133,226
Glass and glassware	...	...	42,225	...	43,238
Gunny bags	...	...	40,652	...	117,905
Iron and steel	...	...	118,589	...	128,997
Lead	...	...	1,554	...	1,850
Lucifer matches	Gross of boxes	2,081,123	...	2,898,748	...
Naila	...	...	20,944	...	20,575
Petroleum	Gallons	22,375,744	...	31,761,800	...
Paint and paint oils	...	...	49,677	...	43,227
Soap	...	...	9,355	...	14,822
Tar	...	...	7,858	...	5,222
Zinc	...	...	7,057	...	7,705
Miscellaneous	...	...	2,326,711	...	2,584,317

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NETHERLANDS.

Annex 11.—BULLION.

SPECIE SHIPMENTS TO NETHERLANDS-INDIA IN 1893.—GOLD.

					£
Sovereigns	..	..	..	..	87,000
Francs, 400,000	..	..	..	..	15,000
Total	..	..	..	..	102,000

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1894.
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NETHERLANDS.

REPORT FOR THE YEAR 1893
ON THE
TRADE OF AMSTERDAM.

REFERENCE TO PREVIOUS REPORT, Annual Series No. 1288.

*Presented to both Houses of Parliament by Command of Her Majesty,
JUNE, 1894.*

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1305. Somali Coast	½d.	1365. Piræus	2d.
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1307. Paramaribo	1d.	1367. New Orleans	2½d.
1308. Oporto	1½d.	1368. Angora	1d.
1309. Naples	½d.	1369. Antwerp	2d.
1310. Salonica	2½d.	1370. Genoa	3½d.
1311. Valparaiso	2d.	1371. Batoum	2d.
1312. Mozambique	1d.	1372. Rouen	2½d.
1313. Odessa	1½d.	1373. Santo Domingo	½d.
1314. Honduras	2d.	1374. Nantes	1½d.
1315. Batoum	4d.	1375. Taganrog	2½d.
1316. Quilimane	1d.	1376. Ispahan	4½d.
1317. Copenhagen.. ..	1d.	1377. Leghorn	2d.
1318. Lima	1d.	1378. Cagliari	1d.
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1326. Florence	1d.	1386. Caracas	1½d.
1327. Hakodate	1d.	1387. Vienna	1½d.
1328. Paris.. ..	2d.	1388. Madeira	½d.
1329. Paramaribo	1½d.	1389. Panama	1½d.
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1331. Patras	1½d.	1391. Manila	2d.
1332. Calais	2½d.	1392. Foochow	1d.
1333. Loanda	1d.	1393. Ningpo	1d.
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1335. Taganrog	1d.	1395. Tamsui	1d.
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1337. Riga	2d.	1397. Philadelpnia	3d.
1338. Batavia	1½d.	1398. Bilbao	2d.
1339. Boston	1½d.	1399. Dunkirk	1d.
1340. Baltimore	1½d.	1400. Amoy	1½d.
1341. Havre	2½d.	1401. Tientsin	1d.
1342. Vera Cruz	1d.	1402. Ichang	1d.
1343. Saigon	1½d.	1403. Aleppo	1d.
1344. Stockholm	2d.	1404. Madrid	1d.
1345. Calata	1½d.	1405. Newchwang	1d.
1346. Trebizond	1d.	1406. Wenchow	½d.
1347. Algiers	3d.	1407. Pakhoi	1½d.
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NETHERLANDS.

AMSTERDAM.

Consul Robinson to the Earl of Kimberley.

My Lord, *Amsterdam, May 31, 1894.*

I HAVE the honour to enclose herewith a Report upon the Trade and Navigation of the port of Amsterdam for the year 1893.

I have, &c.
(Signed) W. C. ROBINSON.

Report on the Trade and Navigation of Amsterdam for the Year 1893.

ABSTRACT of Contents.

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General condition of trade, &c., in 1893	1
Imports	2
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Returns of shipping	11

Amsterdam was not exempted in the past year from the General
general depression in trade which seems to have pervaded the remarks.
entire commercial world, and there is again a slight decrease in
the total volume of home and foreign trade and commerce to be
chronicled, as compared with the previous year.

Prices of nearly every description of produce again gave way
more or less. Freights remained exceedingly depressed and
generally unremunerative.

Industry also was in a less favourable position than in 1892;
and the continued fall in the prices of stocks made business on
our Stock Exchange far from satisfactory either to speculators or
to investors.

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The public showed a strong disinclination to invest in any new undertaking; and the crisis in the United States, from the results of which Holland is still suffering considerably, the continued heavy fall in silver, the financial difficulties in Southern Europe and in South America, together with the tariff war between Russia and Germany, all combined to produce a feeling of depression and disappointment.

On the other hand the city itself continued to carry on an apparently prosperous home and retail trade, with a steadily increasing population. During the winter the yearly recurring complaint as to want of employment was again heard, but the mildness and shortness of the winter did not subject the unemployed to such long privation as in severer times, and although great efforts were made on the part of socialistic agitators to make use of trade depression and want of employment, they were markedly unsuccessful from the moment that spring employment began. The city has been fairly free from labour disturbances throughout the year. Nor does the near prospect of a considerable extension of the franchise appear to arouse much interest or enthusiasm at present.

Imports.

Coffee.

The trade in 1893 was, on the whole, lifeless, and unsatisfactory for importers and dealers.

Prices began to fall early in the year, good ordinary Java quoted at $10\frac{1}{2}d.$ per lb. dropped to $9d.$ per lb. in November, closing dull and drooping at $9\frac{1}{2}d.$ to $9\frac{3}{4}d.$ per lb.

The importation of Santos coffee increased, and there was less fluctuation in prices, which ranged from $9d.$ to $9\frac{3}{4}d.$ per lb. at the year's close.

The sales officially reported (which do not, however, include the sales to arrive, and those made through the clearing-house) amounted to:—

Year.					Number of Bags.	Number of Chests.
1893	..	..	..	..	589,000	2,505
1892	..	..	..	..	449,700	1,174
1891	..	..	..	..	466,577	1,338
1890	..	..	..	..	691,977	1,669
1889	..	..	..	..	803,709	3,643

Much of the Java crop no longer passes through the Amsterdam market, being shipped direct from India to the Mediterranean and to the United States.

Sugar (beet).

There were very considerable fluctuations in our market, consequent upon the extreme dryness of the early summer, which caused fears as to the success of the beet crops in Germany and

here. Ample rains, however, set in just in time, and instead of a deficiency, the growing crop showed a very considerable increase on that of the previous year.

Prices, which had been driven up to 19*s.* per cwt. for summer delivery, naturally gave way again in the autumn, and fell away gradually to 12*s.* 6*d.* per cwt. for raw beet, the market closing dull and lifeless.

The trade in cocoa continues to extend itself considerably. *Cocoa.* Prices, however, were unsatisfactory, showing a falling tendency throughout the year. Surinam cocoa, which, in consequence of the failure of the Trinidad crop, was at first in good demand at 7½*d.* to 8¼*d.* per lb., and even reached 8½*d.*; fell to 6½*d.* and 6¾*d.* in consequence of the large imports of other similar descriptions.

Java cocoa rose from 11¼*d.* to about 1*s.* 1½*d.* per lb., to fall again to 10*d.* to 10¼*d.* for fine descriptions, and even 9*d.* to 9¼*d.* for ordinary sorts. Home and foreign consumers purchased considerable quantities at the low prices. The total sales amounted in 1892 to about 1,300 tons, being an increase of 50 per cent. on 1892.

Prices fell considerably during the year in consequence of the Tea. immense increase of production in British India and Ceylon. The importation from Java amounted to :—

Year.						Number of Quarter Chests.
In 1893	..	..	..	..	..	40,107
1892	..	..	..	..	..	38,959
1891	..	..	..	..	..	18,944

The average price realised being 7*d.* per lb.
Of China tea :—

Year.						Number of Quarter Chests.
In 1893	..	..	..	..	..	2,792
1892	..	..	..	..	..	3,531
1891	..	..	..	..	..	2,648

were imported. British India tea does not suit the Dutch taste, and none was directly imported; and of Ceylon tea only 101 chests reached our market.

This article was in a most unfortunate position throughout the Tin. year. Over-production, increased import duties, the fall in silver, and general malaise, reduced prices from 46*l.* 15*s.* per ton in the beginning of the year to 38*l.* at its close, the lowest price known since 1885. Banca, however, was quoted at 39*l.* 10*s.*, there being special orders for this description.

There was a considerable importation, but prices were unsatis- Hides. factory. The United States ceased to buy, while in Europe, in
(1789) A 3

consequence of the drought, more animals than usual were slaughtered.

The imports were :—

Year.					Cow Hides.	Buffalo Hides.
In 1898	..	..	..	..	176,831	128,804
1892	..	..	..	..	141,974	122,389

Prices, 3*d.* to 6*d.* per lb. for East India cow hides, and 2*d.* to 4*d.* per lb. for buffalo hides.

A very large increase took place in the importation of Java goat-skins, but a great proportion remained unsold.

The trade was, on the whole, fairly satisfactory. In consequence of the smallness of the stock good prices were realised early in the year, best quality, 7*s.* 0½*d.*, good ordinary, 5*s.* 8½*d.* per lb., but dropped temporarily, closing, however, firmly though quietly.

The imports were :—

Year.					Number of Chests.
In 1893	..	..	..	..	2,652
1892	..	..	..	..	4,073
1891	..	..	..	..	4,791
1890	..	..	..	..	3,646

Rice.

The importation of rice in Amsterdam and Zaandam amounted to :—

Year.					Number of Bags.
In 1893	..	..	..	..	1,073,470*
1892	..	..	..	..	910,930

* Of which 848,990 bags to Zaandam.

Prices of Java rice ranged from 11*s.* 8*d.*–13*s.* to 14*s.*–15*s.* per cwt. in 1893, as compared with 11*s.* 3*d.*–12*s.* 6*d.* to 15*s.*–16*s.* per cwt. in 1892. Cleaned Rangoon, 7*s.* 6*d.*–8*s.* 4*d.* to 9*s.*–10*s.* 3*d.* per cwt. in 1893, as compared with 8*s.* 4*d.*–10*s.* to 10*s.* 3*d.*–11*s.* 8*d.* in 1892.

The total importation was :—

From—	Number of Bags.
Rangoon	504,000
Bassein	328,000
Necransee	130,000
Saigon Siam	186,000
Japan	128,000
Java.. .. .	200,000

NOTE.—Of which about 403,000 bags to Rotterdam.

This article shared in the universal depression. Strikes in Cotton. England, disinclination to buy, unfavourable statistics, and a large crop in the United States had their natural effect. Middling American dropped in price from 6*d.* to 4½*d.* per lb. at the close of the year.

The importation in Amsterdam amounted to 25,118 bales American in 1893, against 25,989 bales American in 1892.

There were considerable fluctuations in the course of the year Copra. in the prices of copra, which rose from 13*s.* 6*d.* per cwt. to 17*s.* 6*d.*, falling to 15*s.* per cwt., rising again in August to 16*s.* 3*d.*, but closing dully at 13*s.* 9*d.* to 14*s.* 3*d.* per cwt. The total sales were :—

	Quantity.
	Kilogrammes.
Java.. .. .	700,000
Sangir	2,891,000
Marapan	340,000
Gorontalo	220,000
Padang	680,000
Surinam	16,000
Total	4,847,000
„ 1892	5,287,000

The course of affairs in this considerable branch of trade was, Tobacco. in many respects, unsatisfactory.

The Sumatra crop of 1892 was small (144,797 bales against 244,892 bales in 1891), and the percentage of light coloured sorts better. The first importations consisted nearly exclusively of these sorts, and as there was a considerable demand for the United States, prices were forced up as high as 5*s.* to 6*s.* 8*d.* per lb.

In the autumn, however, when the American demand had ceased, and when the ordinary dark-coloured tobaccos had to be placed on the market, there was a very great reaction, and most of the dark tobaccos had to be sold at very low rates, even 6*d.* to 10*d.* per lb. being accepted.

The average price of Sumatra was 2*s.* 2*d.* per lb. as compared with 1*s.* 6¾*d.* in 1892, and 1*s.* 2¾*d.* per lb. in 1891. The crop of (1789)

1893 is estimated at over 160,000 bales. The Java crop consisted of :—

	Quantity.	
	1892.	1891.
	Bales.	Bales.
Leaf	68,189	68,849
Crossoh	110,151	67,510

Prices averaged :—

	Per Lb.	
	1893.	1892.
	d.	d.
Leaf	11½	9½
Crossoh	4	3½

The quality of the leaf tobacco being better than in the previous year.

Borneo sent 10,225 bales, averaging in price 2s. 0½d., against 1s. 1d. in 1892, the quality being lighter coloured and better.

Sugar, refined. There is not much change to report from the previous year. The demand from Russia and America improved in some degree, and especially towards the end of the year there was more activity in the trade.

Petroleum. This article was also much depressed. American was quoted in the beginning of the year 5s. to 5s. 1d., but fell as low as 4s. 3d. per cwt.

The importation from the United States was 428,413 barrels in 1893, while Russia sent 29,369 barrels only.

Cereals. The trade in grain of all descriptions was dull and dragging throughout the year, and the low level of prices continuing unchanged, transactions were mostly carried on at a loss.

Wheat. The fall in the price of wheat during 1893, though not nearly so severe as in the previous year, still amounted to 4s. 6d. per quarter of 480 lbs.; there were some fluctuations in consequence of the drought feared in the early summer, which caused a temporary reaction, followed however by increased imports from all quarters, which soon swamped the market. The very low freights naturally encouraged importation.

Prices closed at :—

	Per 480 Lbs.	
	From—	To—
	£ s. d.	£ s. d.
Odessa	..	1 3 0
Danube	..	1 2 2
Soft red Kurrachi	1 2 0	1 2 2
American	..	1 4 9

The low prices of wheat, barley, &c., interfered very greatly Rye. with the sale of rye, and the demand fell off considerably until prices had reached a level which opened a demand for rye as forage.

The tariff war between Russia and Germany was also a severe blow for our market, since Germany was always a large customer in it. Now that a treaty has been concluded a better trade may be looked forward to.

Prices end of December, 1893 :—

	Per 480 Lbs.	
	£ s. d.	
Taganrog	1 0 0	
Danube	0 19 8	
St. Petersburg	1 2 6	
America	1 3 4	

The trade in barley, in consequence of the very dry summer Barley. and scarcity of forage, was a very brisk one, but the imports were on so large a scale that a gradual fall of 4s. per 480 lbs. during the year was the result.

The importation from North America was regular, and there Maize. were no great fluctuations in price, the tendency, however, being downwards.

An improvement in the price of rape-oil early in the year Rapeseed. caused a considerable demand, especially for British-Indian sorts, European seed being much too dear in proportion. Large quantities of seed were re-exported from hence to Southern and Eastern Europe, where the crops were more or less a failure.

Prices ruled from 2*l.* 4*s.* to 2*l.* 10*s.* per 480 lbs.

Herein also there were large transactions, principally for Linseed. British-Indian sorts. North America sent also considerable quantities.

Prices ruled from 2*l.* 5*s.* to 2*l.* 15*s.* per 480 lbs.

Prices rose during the period from March to May to from Oils : 1*l.* 2*s.* 6*d.* to 1*l.* 3*s.* per cwt. in view of the drought, but the Rape. crops of seed proving larger than had been anticipated, fell away again to 18*s.* 6*d.* per cwt., closing at 1*l.* per cwt.

Linseed oil. Transactions were very lively during 1893. Prices rose from 16*s.* 8*d.* per cwt. to 1*l.* per cwt. in the first three months, falling, however, in the autumn temporarily to 18*s.* per cwt., but the export demand continuing good, they recovered again, reaching 1*l.* per cwt. in October, closing, however, dull and lower at 18*s.* per cwt.

Textile goods. This branch of trade suffered, like the rest, from the general depression, and only the cheaper description of goods found ready sale.

The complaints of over-production continue rife, swarms of agents and travellers continuing to press their goods on our limited market.

The project of law referred to in my last year's report, which is to do away with the evils of the present system of levying duties, has not yet been dealt with by the Government. No doubt an equalisation of the duties, and an avoidance of smuggling malversations, will give a better tone to the whole trade.

The total imports into Holland of late showed, on the whole, an increase, amounting in 1892 to about 81,490,000 lbs. of yarns, or 2,628,000 lbs. more than in 1891; 113,400,000 lbs. of textile goods, or 10,326,000 lbs. more than in 1891; 8,853,000 lbs. of wool, or 19,822,000 lbs. more than in 1891; of which about 70 per cent. came from Great Britain; of the remainder about 12 per cent. came from Germany, and 18 per cent. from Belgium and France.

Ready-made clothing comes, for the larger part, from Germany. Statistics for the year 1893 have not yet appeared.

Timber. The trade in timber was, on the whole, fairly good. The restriction of production in Sweden helped to steady prices, which ruled about the same as in 1892. The proportion between rough and finished timber changes, however, yearly more and more in favour of the latter, and our sawmills can no longer compete with those in the lands of production. The importation of baulks is, therefore, less and less profitable, every effort being made to ensure the importation in as finished a state as possible.

American pitch pine found it difficult to compete with European timber, being proportionately too dear, so that importation, even at present very low freights, was hardly profitable.

Considerable quantities of Java baulks (djati wood) were imported, also of djati sleepers.

Exports.

Cattle and sheep. The importation from this port into England being still prohibited, the number of calves and sheep exported continued insignificant.

Liqueurs. The financial difficulties in the countries which are their

principal customers—South America, Spain, Portugal, and Italy—bore heavily upon our distilleries, and reduced their sales not inconsiderably in these directions. Nevertheless, the trade was, on the whole, not unsatisfactory, and has not greatly suffered, the deficiency having been partly made up in other directions.

The year was an unfavourable one for cleaners, partly in consequence of the constant fall in prices, partly on account of the financial difficulties and protective duties in countries formerly large customers.

The crisis in the United States was of very depressing influence on our diamond export; orders from thence for brilliants, for which they are our chief customers, ceased nearly altogether after May, and the state of trade generally was extremely unsatisfactory.

There is no material change to report, the state of the export trade, considering the very generally depressed condition of foreign markets, was not unsatisfactory.

The year was, on the whole, not a profitable one for manufacturers and exporters of artificial butter, as the prices of the raw material ruled too high in proportion to those for the manufactured article.

Great Britain imported from Holland :—

Year.					Quantity.	
					Natural Butter.	Margarine Butter.
					Cwts.	Cwts.
1893	..	..	..	..	2,327,473	1,300,033
1892	..	..	..	..	2,183,009	1,305,350
1891	..	..	..	..	2,135,605	1,235,430

Stock Exchange.

The great silver crisis which broke out in the United States in the early summer of 1893 had a most serious influence on the Dutch financial market.

All second-class securities were unduly depressed, while the best descriptions were driven up to very high quotations. Heavy losses were incurred here in American railway stocks, and many forced sales took place. Speculation was in consequence greatly curtailed, and the public showed no disposition to interest itself in any new investments or undertakings.

Public Works.

There is little of importance to chronicle in this respect for the past year. Considerable delay, in consequence of technical

Ymuiden. difficulties, was experienced in the construction of the new large lock at Ymuiden, and at present the prospects for its prompt completion are not encouraging.

Navigation.

There has been a slight falling-off in the number of vessels entering our port, and the total is smaller than the average of some years past. The deficiency is principally accounted for by the decreased importation of iron ore, coal, and timber. A large proportion of ore has been shipped to Rotterdam instead of to Amsterdam. Coal imports suffered greatly by the long coal strike in England, and timber imports fell off in consequence of the over-importation in the previous year.

The number of ships and steamers continues to decrease in a marked manner, while the respective tonnage increases. The vessels and tonnage cleared inwards since 1861 show the following figures:—

Year.	Number of Vessels.	Tons Gross Register.
1861	2,073	603,660
1871	1,620	725,060
1881	1,658	784,370
1891	1,723	1,616,950
1893	1,558	1,595,700

The clearances inwards at Ymuiden were:—

Year.	Number of Vessels.	Tons Gross Register.
1892	4,507	1,848,660
1893	4,780	1,815,230

Showing the great increase in the number of small fishing vessels which now make use of that harbour.

Most of the regular lines from our port have done fairly well throughout the year, and in the case of the principal lines better dividends than in 1891 and 1892 have been earned.

Up to the present the opening of the Manchester Ship Canal does not appear to have had any influence on the navigation of our port.

The trade with the United States suffered a considerable decrease, in consequence of the falling-off of grain imports from thence.

Freights in general, especially for adventuring vessels, were disappointing and very unremunerative, nor is there as yet any sign of permanent improvement.

RETURN of Some of the Principal Articles of Import to the
Port of Amsterdam during the Years 1891-93.

Articles.			Quantity.		
			1891.	1892.	1893.
Coffee	Tons ..	29,552	26,290	Not yet published	
Sugar	" ..	80,100	65,590		
Tea	" ..	1,922	2,650		
Tin	" ..	..	..		
Hides	Number ..	311,737	315,780		
Indigo	Tons ..	376	..		
Rice	" ..	29,605	20,898		
Cotton	Bales ..	42,723	64,800		
Tobacco	Tons ..	29,270	28,079		
Rye	Quarters ..	397,696	69,615		
Wheat	" ..	263,459	245,640		
Barley	" ..	72,477	..		
Flour	Tons ..	31,162	28,115		
Linseed	Quarters ..	444,988	367,000		
Petroleum	Tons ..	58,740	..		

RETURN of all Shipping at the Port of Amsterdam during the
Year 1893.

ENTERED.

Nationality.	Sailing.		Steam.		Total.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.
British ...	37	27,183	671	515,631	708	542,814
Austrian ...	1	769	1	1,323	2	2,092
Belgian ...	..	..	..	..	..	..
Danish ...	19	4,031	14	12,787	33	16,818
French ...	2	178	7	4,731	9	4,909
German ...	6	7,529	180	126,204	186	133,733
Greek ...	..	..	..	..	..	..
Italian ...	3	2,327	..	..	3	2,327
Dutch ...	57	24,076	490	398,973	547	423,049
Norwegian ...	65	28,340	79	43,527	144	71,867
Russian ...	7	3,067	1	1,058	8	4,125
Spanish ...	..	..	18	24,176	18	24,176
Swedish ...	5	2,004	22	15,964	27	17,968
Total ...	202	99,504	1,483	1,144,374	1,685	1,243,878

CLEARED.

Nationality.	Sailing.		Steam.		Total.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.
British ...	40	27,379	666	503,546	706	530,925
Austrian ...	1	769	1	1,323	2	2,092
Belgian ...	..	..	..	..	..	..
Danish ...	19	4,031	14	12,963	33	16,994
French ...	3	1,411	7	4,729	10	6,140
German ...	6	6,590	183	127,077	189	133,667
Greek ...	..	..	..	..	..	..
Italian ...	3	2,327	..	..	3	2,327
Dutch ...	56	22,948	500	405,353	556	428,201
Norwegian ...	71	31,114	80	43,975	151	75,089
Russian ...	6	2,597	1	1,058	7	3,955
Spanish ...	..	..	18	24,176	18	24,176
Swedish ...	5	2,004	22	15,964	27	17,968
Total ...	210	101,370	1,492	1,140,164	1,702	1,241,534

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AND FINANCE.

NETHERLANDS.

REPORT FOR THE YEAR 1893

ON THE

TRADE, &c., OF ROTTERDAM.

REFERENCE TO PREVIOUS REPORT, Annual Series No. 213

Presented to both Houses of Parliament by Command of Her Majesty,
AUGUST, 1894.

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1372. Rouen	2½d.	1432. Hamburg	2½d.
1373. Santo Domingo	½d.	1433. Brindisi	2½d.
1374. Nantes	1½d.	1434. Gothenburg	2d.
1375. Taganrog	2½d.	1435. Kiungchow	1d.
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1378. Cagliari	1d.	1438. Chicago	2½d.
1379. Boston	1d.	1439. Odessa	2d.
1380. Palermo	3d.	1440. Tabreez	½d.
1381. New York	2d.	1441. Tahiti	½d.
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NETHERLANDS.

ROTTERDAM.

Consul Turing to the Earl of Kimberley.

My Lord, *Rotterdam, July 14, 1894.*
I HAVE the honour herewith to transmit my Commercial Report for the year 1893, and have only to add that the late issue by the Rotterdam Chamber of Commerce of their Report is the cause of the delay in submitting mine.
I have, &c.
(Signed) HENRY TURING.

Report on the Trade and Commerce of Rotterdam for the Year 1893.

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Introductory Remarks.

From a general commercial point of view the results of the year under review have been far from satisfactory, to which several circumstances have contributed.

The collapse of several Australian banks, the financial crisis in the United States, the uncertainty regarding the withdrawal of the Sherman Act and any possible changes in the American tariff, the political disturbances in the South American States, the financial difficulties in Spain, Portugal, Italy, and Greece, and labour strikes in several countries, all these combined to bring about the general depression which characterised the commercial world in 1893, and in which Holland duly shared.

It is satisfactory to record, however, that notwithstanding the dulness in trade, Rotterdam maintained its reputation as a leading continental port, as proved by the fact that the number of vessels and the total tonnage that entered here exceeded the respective figures for the previous year, whilst the total imports show an increase of 15 per cent. as compared to those of 1892.

Money Market.

The official rate of discount fluctuated between $2\frac{1}{2}$ per cent. and 5 per cent., the latter figure being attained on August 21. The heavy fall in the value of American railway stocks caused serious losses to investors and capitalists, whilst the latter also suffered heavily through the depreciation of Italian stocks.

Imports.

Coffee.

The market was subject to many fluctuations, in a great measure due to the financial crisis in the United States and the revolution in the Brazils, whilst the contradictory reports from the latter country as regards the probable yield of the 1894-95 crop greatly tended to disorganise the course of prices in the terminal markets.

The Brazil crop was first estimated at from 8,000,000 bags to 9,000,000 bags, but these figures were found to be greatly exaggerated and were reduced to 7,000,000 or 7,500,000, a subsequent estimate placing the probable yield at not higher than 6,000,000 or 7,000,000 bags.

It is satisfactory to note that the imports from Santos amounted during the year to 277,400 bags and those from Africa to 40,000 bags, in both instances a not inconsiderable increase compared to former years, the larger arrivals from the Brazils resulting from the establishment of a direct line of steamers between that country and this port. Coffees from Central America also find their way to this market, and would no doubt do so in larger quantities if direct steam communication also existed between the respective countries.

Prices of good ordinary Java fluctuated between 84s. per cwt. and 94s. 6d. per cwt.; and those of Santos between 75s. 6d. per cwt. and 84s. per cwt.

The total import into the Netherlands of all kinds amounted to 1,031,100 bags, against 851,100 bags in 1892, of which quantities 415,490 bags and 397,660 bags were for account of private importers at Rotterdam, the balance being imported by the Netherlands Government and private houses at Amsterdam.

Prices had a downward tendency throughout the greater part of the year, whilst the tariff war between Russia and Germany greatly tended to accentuate the uncertainty which characterised the markets of the leading articles. Cereals.

When pointed out that a very large proportion of the grain exported from Russia arrives here for transhipment to Germany, it is obvious that the additional respective duties imposed by Germany on July 25, 1893, of 36 per cent. and 46 per cent. on Russian wheat and rye, seriously hampered local business; and although the levying of the new tax resulted in many instances in forced sales in this market for German or Russian accounts, yet these advantages scarcely compensated for the harm caused by the action of the two abovenamed countries.

The prices of the undermentioned grains ranged from—

Description.							Prices.					
							From—			To—		
£	s.	d.	£	s.	d.							
Wheat	..	..	..	..	Per quarter	..	1	5	6	1	10	0
Rye	..	..	..	..	"	..	0	17	6	1	3	10
Barley	..	..	..	..	"	..	0	13	6	0	19	0
Oats	..	..	..	..	Per cwt.	..	0	5	6	0	6	9
Maize	..	..	..	..	"	..	0	4	7	0	6	0

The arrivals in the river amounted to :—

Description.					Quantity.	
					1893.	1892.
					Quarters.	Quarters.
Wheat	..	..	..	..	2,170,000	2,060,000
Rye ..	..	..	..	..	1,030,000	720,000
Barley	..	..	..	..	1,320,000	790,000
Maize	..	..	..	..	1,080,000	810,000
Oats ..	..	..	..	..	980,000	170,000
Total	..	..	..	..	6,580,000	4,550,000

Tea. The total imports into Holland of this article amounted to 176,100 packages of about 80 lbs. each, of which 48,000 packages arrived from Java. The consumption of Java kinds is on the increase in this country, and unless the quality of China descriptions improve and return to its standard of former years, these kinds bid fair to be supplanted within a not too distant period by Java, Ceylon, and India teas.

Sugar. As compared to 1892 the course of prices during 1893 was just reversed, for whereas in the former year the lowest prices were reached during the summer months, the highest were obtained in the corresponding period for 1893. Towards the end of March unfavourable reports were received as to the probable outturn of the crop in Cuba, whilst the general drought throughout Europe caused serious fears regarding the growing beetroot crop. The uncertainty in this respect continued until June and resulted in a marked rise in prices, until the long wished for break in the weather caused the upward tendency to be arrested, and a fall in values set in which was accentuated in October by the publication of figures regarding the beetroot crop, which instead of showing an expected deficit, proved that a considerable surplus would be yielded, and prices at the end of the year were below the lowest points reached in the two previous years.

The price of beet sugar was about—

In—						Price per Cwt.	
						s.	d.
January	..	..	..	..	..	14	4½
June..	..	..	..	..	..	19	3
August	..	..	..	..	..	14	0
November–December	..	..	..	..	..	12	3

						Quantity.
						Tons.
The arrivals of colonial sugars in 1893 amounted to	..					1,414
" foreign refined..	..	..	..	..	..	6,579
" and production of beet sugar	..	..	..	..	..	161,477
Export of refined sugar	..	..	..	..	..	103,366
Deliveries	..	..	..	..	..	151,386
Stock on December 31..	..	..	..	..	..	52,694

The beetroot sugar manufacturers in Holland produced 75,000 tons and their financial year was very satisfactory, whereas refiners were less fortunate and in most instances did a bad business, whilst the local refinery has entirely stopped work and its premises are about to be sold.

On the whole 1893 was a disappointing year to many interested Tobacco. in the trade. The actual outturn of the 1892 Sumatra crop was considerably below that of the preceding year and this gave rise to serious disappointments, for whereas the first arrivals consisted of fine light coloured descriptions for which exorbitant prices were paid by American buyers, the subsequent imports were much inferior in quality, whilst the cessation of purchases by America and the uncertainty as to the imposition by Germany of additional duties had a very disastrous influence on the course of prices at the autumn sales.

The average price, however, was 125 c. or about 2s. 1d. per lb. against 1s. 6½d. for the 1891 crop. The total yield of the Sumatra crop was 136,381 packages averaging 2s. 1d. per lb., aggregating in value upwards of 2,200,000l.

For the preceding 15 years the financial results were as follows:—

Year.						Value.
						£
1878..	..	..	..	..	..	750,000
1879..	..	..	..	..	..	900,000
1880..	..	..	..	..	..	1,000,000
1881..	..	..	..	..	..	1,200,000
1882..	..	..	..	..	..	1,800,000
1883..	..	..	..	..	..	1,600,000
1884..	..	..	..	..	..	2,400,000
1885..	..	..	..	..	..	2,300,000
1886..	..	..	..	..	..	2,700,000
1887..	..	..	..	..	..	2,180,000
1888..	..	..	..	..	..	2,800,000
1889..	..	..	..	..	..	3,000,000
1890..	..	..	..	..	..	2,040,000
1891..	..	..	..	..	..	2,400,000
1892..	..	..	..	..	..	2,180,000

The 1892 crop of Java tobacco yielded 179,350 packages, against 136,726 packages the previous year, and the following (1833)

table shows the outturn, average price, and value of the respective crops for the past 15 years:—

Year.					Packages.	Average Price.	Yield.
					Number.	s. d.	£
1878	..	..	..	..	153,636	0 11½	1,227,750
1879	..	..	..	..	50,271	1 1	453,000
1880	..	..	..	..	149,630	0 8	838,917
1881	..	..	..	..	195,771	0 5½	758,333
1882	..	..	..	..	73,798	0 6	297,500
1883	..	..	..	..	76,473	0 9½	534,583
1884	..	..	..	..	122,806	0 7	652,166
1885	..	..	..	..	109,701	0 7	602,333
1886	..	..	..	..	106,640	0 7½	568,500
1887	..	..	..	..	138,309	0 7½	771,166
1888	..	..	..	..	169,837	0 5½	661,883
1889	..	..	..	..	141,150	0 6	625,000
1890	..	..	..	..	182,406	0 5	666,666
1891	..	..	..	..	136,726	0 6½	653,166
1892	..	..	..	..	179,350	0 6½	848,666

The arrivals from British Borneo were smaller than last year, but the quality was superior, and hence the average price was about 8d. per lb. higher, and averaged nearly 2s. per lb.

The tobacco from Dutch Borneo was on the whole inferior, and fetched but low prices, excepting in one instance where the produce from the estate was very fine and realised 3s. 1d.

Oleo-
margarine.

The market experienced many and wide fluctuations during the year, caused in the first instance by moderate stocks in first, and small supplies in second hands, and advancing prices of neutral lard, which circumstances combined to bring about a speculative movement, and prices rose from 2l. 16s. 3d. to 3l. 7s. 6d. per cwt. within a very short period. This resulted in larger shipments from America, and with a sharp decline in the value of lard, coupled with dull markets for butter, prices soon experienced a fall to 2l. 12s. 6d. to 2l. 11s. 6d. for first and to 2l. 10s. to 2l. 9s. for second quality, at which rates manufacturers bought freely. The drought, which commenced in April and continued uninterruptedly till the first fortnight in July, caused prices of hay and other fodder to rise enormously, and hence it was feared that butter would become scarce and dearer, and the demand for margarine would thereby be considerably stimulated. Under this impression prices for first qualities advanced to 2l. 18s. to 2l. 19s., and a further considerable rise was looked for, when suddenly the financial crisis in the United States broke out, and holders of goods were forced to realise, causing values to recede to 2l. 11s. 6d. to 2l. 10s. 10d. A further decline was arrested through decreased shipments from America, but business remained quiet and was of little importance, the margarine manufacturers holding ample stocks of the raw material, whilst the strikes in the mining districts in England unfavourably influenced consumption. In October prices rose to 2l. 19s. 9d., and in December the market closed at 2l. 15s. 6d., with an upward tendency.

The arrivals from America were as follows :—

Year.						Quantity.
						Tierces.
In 1893	..	..	..	..	..	225,100
1892	..	..	..	..	..	230,439
1891	..	..	..	..	..	189,500
1890	..	..	..	..	..	264,000
1889	..	..	..	..	..	245,000

The average annual consumption of American oleo-margarine for the last 5 years was 230,000 tierces, or about 4,435 tierces per week.

Neutral lard is also largely imported here from America, as Neutral lard. shown by the following figures :—

Year.						Quantity.
						Tierces.
In 1893	..	..	..	..	..	78,500
1892	..	..	..	..	..	111,600
1891	..	..	..	..	..	62,200
1890	..	..	..	..	..	50,000

The market opened at 29*l.* 12*s.* per ton, which price soon advanced to 42*l.* 6*s.* per ton under the influence of small stocks and decreasing arrivals, and consumers were forced to supply their requirements in Trieste and Marseilles. Subsequently the market declined owing to larger arrivals and the fall in the value of lard, the latter greatly influencing prices of cotton-seed oil, which article is used in the manufacture of the so-called "compound lard," and prices of spot oil receded to 27*l.* to 25*l.* 10*s.* per ton, and for delivery, ex the new crop, large contracts were effected at 25*l.* 10*s.* to 24*l.* 10*s.* per ton. Refined cotton-seed oil.

It is impossible to give an exact return of the imports during the past year as a large proportion came from Trieste, Genoa, and Marseilles, viâ England; but assuming these indirect importations to have amounted to 13,000 barrels, the total arrivals of American cotton-seed oil in Holland may be estimated at 90,000 barrels, against 100,000 barrels in 1892.

In connection with this article it may not be out of place here to allude to the company which has been formed by the American Cotton Oil Company, of New York, for the storage in this city, and the forwarding of its manufactures such as oil, seed cakes, and other analogous products. Guided by the experience in the matter of tank-steamers for petroleum, it was decided to employ the same means of transport for cotton oil, a considerable saving being thereby effected in the charges for loading and discharging, coupled with cheaper rates of freight, whilst the cost of storing in tanks are likewise lower and the manipulation is simpler than in the case of oil in barrels. The Holland-American Cotton Oil Company's Stores.

Owing to the very favourable geographical position of Rotterdam as a continental port whence Germany and the other countries of Europe can easily be reached at low freights, coupled with the great facilities for vessels of all sizes to load and discharge here, the American Cotton Oil Company decided to establish their chief European office in this city, and a plot of ground was bought from the town authorities on the left bank of the river, where several tanks have been built, and also a factory for the manufacture of seed-cake and flour, together with the necessary pumping and other machinery.

Landing stages have been erected by the local authorities, nearly the whole cost of which will be defrayed by them, whilst the railway companies have arranged to connect the works with the main line of rail. Tank-wagons and tank-lighters are being constructed for the delivery of the oil to consumers, and these latter are preparing storage tanks for their own use.

The "Aco" tank-steamer, capable of carrying 4,200 tons of oil or cakes, and furnished with machinery capable of discharging the whole cargo in 48 hours, was built at the Inch Works, in Glasgow, and will be placed under the Dutch flag, whilst the other properties will be likewise transferred to the local company, which will become a Dutch undertaking with a capital of 104,000*l.* fully paid up by the parent company under the style of the Holland-American Cotton Oil Company.

Petroleum.

Rotterdam continues to maintain its position as the principal port of entry for this article, and 180,000 tons were imported, against 150,000 tons in 1892. Business, however, was not remunerative, as a result of excessive competition under which the whole trade seems to be suffering. A second firm has started the importation of Russian petroleum.

TABLE showing the Principal Articles Imported into Rotterdam during the Years 1893-92.

Articles.	Quantity.	
	1893.	1892.
	Tons.	Tons.
Ore	1,196,288	1,121,198
Cereals—		
Wheat	548,005	520,572
Rye	212,388	150,919
Barley	243,947	145,264
Maize	268,113	203,893
Oats	159,610	26,070
All others	144,988	116,619
Coffee	44,509	42,730
Metals, manufactured	244,629	189,894
" unmanufactured	71,515	78,032
Oleo-margarine	46,493	43,538
Oils—		
Ground-nuts	5,746	4,491
Cotton	29,069	28,488
Sesame and other edible	9,909	8,033
Others, including palm-oil	33,926	35,904
Petroleum	190,574	147,994
Lard	13,121	17,027
Rice	42,880	35,582
Coals	274,634	301,432
Sugar, raw	21,124	30,316
Tobacco, cigars	22,808	22,266
Seeds	98,222	94,997
Miscellaneous	1,014,388	913,545
Total	4,936,896	4,278,849

Shipping and Navigation.

The satisfactory condition of the "New Waterway," the channel through which vessels entering at the Hook of Holland reach the River Maas, has been fully maintained, the greatest depth in the principal fairway reaching $26\frac{1}{4}$ feet under low-water mark. Dredging is always carried on to a greater or less extent, but thanks to the natural process of scouring, it does not require to be resorted to to the same extent as formerly, whilst the channel is navigable at all times for vessels drawing 21 feet and upwards without their requiring to break bulk.

In 1893, 8,708 steamers and 920 sailing vessels measuring 7,219,844 tons, exclusive of 3,928 fishing boats, passed the New Waterway, against last year, 8,303 steamers and 888 sailing vessels with a tonnage of 6,417,232 tons.

The number of vessels that entered this port direct from sea was—

Year.				Number of Vessels.	Tons Net.
In 1893	..	..	..	4,631	3,566,170
1892	..	..	..	4,423	3,120,698
Increase, 1893	..	..	..	208	445,472

RETURN of Vessels Entered at Rotterdam showing the respective Nationalities.

Nationality.	Sailing.		Steam.		Total.	
	Number of Vessels.	Tons Gross.	Number of Vessels.	Tons Gross.	Number of Vessels.	Tons Gross.
Belgian	1	129	7	1,191	8	1,320
Danish	17	3,761	43	49,774	60	52,525
English	146	61,411	2,682	3,880,987	2,828	3,442,398
French	5	3,175	14	14,673	19	17,848
Greek	...	...	24	53,015	24	53,015
Italian	11	6,211	1	1,811	12	8,022
Dutch	61	11,240	733	914,270	794	925,510
American	2	2,916	...	...	2	2,916
German	29	14,212	565	543,997	594	568,209
Norwegian	87	43,581	62	49,449	149	93,030
Austrian	3	2,480	5	9,919	8	12,349
Russian	13	5,163	1	1,672	14	6,835
Spanish	...	...	66	122,299	66	122,299
Swedish	17	9,005	36	19,606	53	28,611
Total	392	163,224	4,239	5,161,663	4,631	5,324,887

COMPARATIVE Statement of Entries at other Continental Ports during the Years 1893-92.

				1893.		1892.	
				Number of Vessels.	Tons Net.	Number of Vessels.	Tons Net.
Dunkirk	..	..	..	2,888	1,526,442	2,910	1,448,002
Havre	..	..	..	2,324	2,067,850	2,315	2,069,714
Hamburg	..	..	..	8,792	5,886,000	8,569	5,638,433
Bremen	..	..	..	2,442	878,712	3,612	1,996,378
Antwerp	..	..	..	4,418	4,692,211	4,321	4,500,091
Amsterdam	..	..	..	1,656	1,158,478	1,632	1,170,231
Rotterdam	..	..	..	4,631	3,566,170	4,423	3,120,698

RETURN of Steamers and Sailing Vessels Registered at Rotterdam and Neighbourhood.

	January 1, 1894.						January 1, 1893.					
	Sailing.			Steam.			Sailing.			Steam.		
	Number of Vessels.	Tons.	Total.	Number of Vessels.	Tons.	Total.	Number of Vessels.	Tons.	Total.	Number of Vessels.	Tons.	Total.
Alblasserdam ..	7	8,474	9,733	1	1,259	9,733	7	8,474	8,474	1	1,259	9,733
The Hague ..	2	382	976	2	594	976	3	675	675	2	594	1,269
Krimpen on-Lek ..	6	8,248	8,248	..	..	8,248	6	8,248	8,248	..	..	8,248
Rotterdam ..	29	14,704	154,172	82	139,468	154,172	34	18,172	18,172	80	138,609	151,781
Schiedam ..	6	3,202	3,202	..	..	3,202	7	3,973	3,973	..	..	3,973
Vlaardingen ..	4	545	545	..	..	545	4	545	545	..	..	545
Total ..	54	35,555	176,876	85	141,321	176,876	61	40,087	40,087	83	135,462	155,549

The total mercantile fleet of the Netherlands was on December 31, 1893, 596 vessels measuring 292,597 tons, and on December 31, 1892, 597 vessels measuring 290,533 tons.

Freights.

Freights were in general not remunerative. Those for the Mediterranean, which in 1892 already were low, receded still further, whilst the rates for grain from America were decidedly bad. On the other hand, outward freights to South America advanced, owing to the political disturbances in that country whereby the chances of obtaining homeward cargo were greatly jeopardised, whilst the rates from the Danube and Black Sea were generally satisfactory.

The following rates for this port were :—

From—		Rate of Freights.					
		From—			To—		
		£	s.	d.	£	s.	d.
Sundsväl	Per standard ..	1	2	0	1	3	0
Hernösand	" ..	1	2	0	1	3	0
Cronstätt	" ..	1	2	0	1	3	0
Oxelsund	Per ton ..	0	13	0	0	5	4½
Danube	" ..	0	13	0	0	16	6
Odessa	" ..	..	..	..	0	10	0
Bilbao	" ..	..	..	..	0	6	0
Seriphos	" ..	..	..	..	0	9	0
Bona	" ..	..	..	..	0	7	9
New York	Per quarter ..	..	..	..	0	2	4½
Baltimore	" ..	..	..	..	0	2	9
Netherlands-India—							
Coffee	Per 1,800 kilos. ..	..	..	..	5	16	8
Tobacco	Per 800 kilos. ..	..	..	..	3	8	10
Tin	Per 2,100 kilos. ..	..	..	..	2	1	8

The opening of the Manchester Canal has resulted in the establishment of a direct line of steamers between Manchester and this port.

Public Works.

Railway.

The Expropriation Bill for constructing a line between the station in the north part of the city and that at the eastern extremity has passed the Legislative Chambers. The necessity of such a line is proved by the fact that it is extremely difficult for large steamers to reach the eastern station (formerly the Rhenish railway station) owing to their having now to pass two bridges, whilst it is of the utmost importance that on the right bank of the river there should be harbours and quays in direct communication with the existing railway system. These works will entail a very large expenditure on the part of the town; but in view of their importance from a commercial point of view the necessary funds will no doubt be voted in due course. Towards the construction of the connecting link by the Dutch Railway

Company, a sum of 100,000*l.* will be contributed by the State, the total cost being estimated at 160,000*l.*

The harbour of Katendrecht on the left bank of the river was completed and can accommodate 10 steamers. It is about 660 feet long and about 360 feet wide, and on the south bank is provided with a shield constructed of heavy timber, to enable steamers to run at it for the purpose of trying their engines. The Rhine harbour, also on the left bank, has been further deepened, and afforded a good refuge during the severe winter for the enormous number of German lighters annually visiting this port, whilst that portion of it, having a depth of 23 feet, was at the same time occupied by large steamers which could thus continue to discharge their cargoes into barges, instead of otherwise lying idle at the buoys in the river. The town council have already voted the necessary funds for erecting substantial quays alongside this harbour, and a portion of these, to the extent of 46 feet, has just been finished.

The land in the immediate vicinity is admirably suited to the erection of industrial or other works, and with this view the municipal authorities have granted 60,000*l.* for the laying out of streets in this neighbourhood. On the completion of all these works, it is estimated that the total expenditure in respect of the Katendrecht and Rhine harbours will amount to upwards of 300,000*l.* Against this sum, however, can now be placed the value of the land already sold, namely 33,000*l.*, and an annual amount of 2,000*l.* for ground rent.

Large warehouses built for account of a company at Amsterdam were finished and are now in use, whilst for a private local firm of wharfingers, operations have commenced for the erection of a similar building.

Two new tanks were added to those already existing on the premises of the firm, officially recognised as "the ware-housemasters," whilst adjoining the territory of the American Petroleum Company a plot of ground has been leased to the representative of the firm of Messrs. Nobel Brothers for the sale of Russian oil. Allusion has already been made in this report to the establishment of the Holland-American Cotton Oil Company's works, which, as well as the aforementioned warehouse and petroleum stores, are situated on the left bank of the river, where also is found the dry dock which during 1893 was employed by 128 vessels and yielded a revenue of nearly 9,000*l.*

Last year the town council voted 60,000*l.* for laying down the necessary plant for lighting the city by electricity and for using it as a motive power in the docks; and the work has been entrusted to Messrs. Siemens and Halske, of Berlin. The wires are now being laid; and next month all the arrangements will have been completed.

Industries.

With the exception of new boilers for several inland craft and for two of the vessels belonging to the Netherlands-American

Shipbuilding
yard and
foundry works
of the

- Netherlands Steamboat Company.** Steamship Company, no works of any magnitude were carried out during the year, the total number of workmen employed having been 648, against 954 in 1892, the respective amounts of wages earned having reached 40,000*l.* and 46,000*l.* No disputes with the labourers occurred throughout the year.
- "The Maas" shipbuilding yard and foundry.** No vessels were built and work was confined to the manufacture of two triple compound machines and to repairs to vessels and machineries, which gave employment to 225 men at a cost of 10,800*l.* The company paid a dividend of 4 per cent. for the past year.
- Distilleries.** The financial outturns of these concerns were not satisfactory. Of a proposed treaty with Portugal, whereby the import duties would be lowered, no further mention is made, and competition with the home-made article is thus becoming keener and more difficult.
- The trade with Australia is very unsatisfactory, which may improve should the duties there be lowered, of which there is a rumour as the increased rates have not led to the expected improvement in the finances of the colony. Large quantities of Geneva are shipped direct from this port to Africa, in which quality is sacrificed to price. Germany and Denmark are keen competitors in the African markets, and Dutch distillers complain of the infringement of their marks by foreigners, against whom they have no recourse.
- Cigar manufactories.** These undertakings worked regularly, and on the whole satisfactorily; and no strikes occurred amongst the labourers as was the case in some other places. Home-made cigars are principally exported to Germany, France, Great Britain, the Dutch and English colonies, Norway, Sweden, and the Levant.
- Margarine manufactories.** The outturn of the several factories was larger than last year, and many be ascribed to the favourable position of this port as regards its contiguity to the great centre of consumption, namely the United Kingdom; but the increasing arrivals there of Australian and New Zealand butter duly influenced the course of prices of margarine.
- Chocolate manufactories.** Business in this line was remunerative. The principal countries to which the Dutch article finds its way are Belgium, the Dutch colonies, and England.
- Chemical manufactory.** The local factory has to compete very keenly with English soap-makers, which latter refine their own glycerine. It exports its products to Germany, England, Norway, Denmark, Belgium, and America.
- Flour-mill.** 1893 has been most unsatisfactory for millers, the very high duties in the neighbouring countries, excepting in Belgium and England, necessitating business to be confined to home consumption, and in this branch keen competition was experienced through the large arrivals of inferior American flour with which the market was flooded; and as a result, several mills have already been closed.

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NORWAY.

REPORT FOR THE YEAR 1893

ON THE

TRADE OF THE DISTRICT OF THE CONSULATE-
GENERAL AT CHRISTIANIA.

REFERENCE TO PREVIOUS REPORT, Annual Series No. 1272.

*Presented to both Houses of Parliament by Command of Her Majesty,
JULY, 1894.*

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NORWAY.

CHRISTIANIA.

Consul-General Michell to the Earl of Kimberley.

My Lord,

Christiania, June 15, 1894.

I HAVE the honour to present the enclosed as my Report on the Trade and Navigation of Norway during the year 1893.

The Trade of Norway, like that of other countries, is still in a state of depression, and the hopes expressed at the beginning of the year have so far not been realised.

I am indebted to the Statistical Bureau for the figures given in the table of the total weight and value of the goods imported and exported, and for the table of goods imported and exported at Christiania.

For the translation from the public journals (mostly from the "Aftenposten") of the Notes on Trade, and for the editing of the Vice-Consular Reports, I am in great part indebted to Mr. Lionel C. Liddell, lately Pro-Consul in this city.

I have, &c.

(Signed) T. MICHELL.

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NOTE.—The following are the rates of conversion used in this report:—

18 kroner	= 1 <i>l</i> .
1,000 kilogrammes	} = 1 ton.
10 hectolitres	
100 litres	= 22 imperial gallons.

(1801)

General Remarks.

In comparison with the two previous years, the estimated official weight and value of the goods exchanged between Norway and foreign countries in 1893 were as follows:—

Year.	Weight.			Value.		
	Imports.	Exports.	Total.	Imports.	Exports.	Total.
	Tons.	Tons.	Tons.	£	£	£
1891	1,910,000	2,115,000	4,025,000	12,389,000	7,244,000	19,633,000
1892	1,920,000	2,154,000	4,074,000	11,110,000	7,027,000	18,137,000
1893	1,986,000	2,197,000	4,182,000	11,365,000	7,560,000	18,925,000

Imports and exports rose, severally, over 1892 by 65,000 tons and 43,000 tons (or by an aggregate of 108,000 tons), and their value by 255,000*l.* and 533,000*l.* (a total of 788,000*l.*), showing some improvement over the averages between the years 1882 and 1890. The depression which the Vice-Consul reports as existing in many branches is not borne out by these figures, although probably the profits of the many small merchants were probably less than usual.

Norwegian Shipping.

So far as the steam mercantile marine is concerned little progress is observable, and the returns of the sailing ships will probably show a falling-off. How large this may be, and how far it has been compensated for by the greater activity of steamers, will first be seen when full details of losses incurred in the storms in November are known. Little or no progress has been made but in any case it has been less than in 1892.

Both these years are in striking contrast to the three previous ones, when the mercantile marine, influenced by the good freights of 1888–90, increased considerably. It was only to be expected that a turn would take place, but that turn has been very distinct.

The following figures give an idea of the progress in ship-building of late years:—

Year.	Steam.		Sailing.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.
January 1—				
1890	592	168,100	6,693	1,443,300
1891	672	203,100	6,760	1,502,600
1892	736	238,500	6,798	1,500,100
1893	767	251,500	6,739	1,493,500

As regards the activity in Norwegian shipbuilding, the following figures are supplied by the Director of the Norwegian building. "Veritas":—

				Net Tonnage.		
				Steam.	Sailing.	Total.
January 1, 1891	..	..	..	16,289	20,773	37,062
July 1, 1891	..	..	..	13,490	20,070	33,560
January 1, 1892	..	..	..	8,830	18,460	27,290
July 1, 1892	..	..	..	5,280	20,070	25,350
January 1, 1893	..	..	..	3,350	18,300	21,650
July 1, 1893	..	..	..	5,600	18,260	23,860

At the beginning of 1891 shipbuilding had reached a point which, although it does not bear comparison with the prosperous condition of that trade in the middle of the seventies, yet exceeded the point noticeable in each of the succeeding years.

Steamship building was pursued with greater activity than ever. Since then this trade has fallen off, and there is a likelihood of its maintaining the level it has now reached. The building of sailing ships has, taken as a whole, been more even, and has been larger than in 1889 and the foregoing years.

Amongst the sailing ships built of late years have been several steel vessels, most of which have been constructed at the Fevig's iron shipbuilding yards at Grimstad.

In the beginning of 1893 there were two sailing ships on the slips of the above yard, each of 1,050 tons, and in July one steel ship of 400 tons. At the same time there was one steel ship of 350 tons being built at Tvedestrand, and one of 600 tons at Stavanger.

On July 1 there were altogether 14 steel steamships on the slips, with a total tonnage of 4,510 tons. These were distributed as follows:—5 at Nyland's and Aker's workshops (total tonnage, 2,490 tons); 5 at Bergen (total tonnage, 1,254 tons); 1 at Fevig's iron shipbuilding yards; 1 at Frederikstad; 1 at Christiansand, S.; 1 at Trondhjem.

Besides these 3 wooden vessels were building, 2 of them at Bergen.

The construction of wooden sailing ships was carried on principally at Grimstad, Arendal, Tvedestrand, and the ports lying between Risør and Christiansand, S.

Builders at the above places seem, on the whole, content with the work done, though prices ruled low.

Ships were built for both Sweden and Denmark. One ship of 4,500 tons is in course of construction.

It may be said that the Norwegian mercantile marine of late years has made satisfactory progress, and won back some of the ground lost during the eighties.

If one steamship ton is counted as three times that of a sailing

ship, Norway, on January 1, 1892, possessed a tonnage of 2,127,200 registered tons (all vessels of 50 tons and over included), representing about 5·1 per cent. of the world's tonnage.

According to the returns, although the tonnage of the Norwegian mercantile marine had, in the beginning of 1893, reached 2,158,800 registered tons, yet, as important additions had also been made in the mercantile marine of other countries, the percentage of the world's tonnage for 1893 cannot be reckoned at a higher figure than 5 per cent. or 5·1 per cent.

In Norway the tonnage of steamships increased by 5·4 per cent., whereas the tonnage of sailing ships decreased, so that, taken together, that increase is reduced to 1·5 per cent.

According to the statistics published by the "Veritas" office, the tonnage of Norwegian steamships increased between July 1, 1892, and July 1, 1893, from 241,600 tons to 260,300 tons, a difference of 18,700 tons, or 7·8 per cent.

The tonnage of sailing ships, on the other hand, shows a falling-off, being 1,375,100 tons, as against 1,390,700 tons in the same period.

Freights.

Freights in
1893.

Throughout the year 1893 the freight market remained at the same low point it had reached at the end of 1892, and there has been no tendency towards improvement. Many ships have consequently been laid up. Several first class wooden and iron sailing ships made small gains on long voyages, although the earnings were comparatively inferior.

Timber
freights.

Freights to foreign ports from Norway, which in 1892 had reached a very low figure, sank even lower in 1893. The rates from Frederikstad to London for unhewn timber, which in the year 1889 commanded 1*l.* 2*s.* to 1*l.* 3*s.* per standard, have since been steadily decreasing. In 1890 they were 1*l.* to 1*l.* 1*s.*; 1891, about 18*s.*; 1892, 17*s.*; 1893, 16*s.* 3*d.* to 16*s.* 6*d.*, per standard.

One freight of 1*l.* 1*s.* was, however, recorded during the summer.

Lathwood.

Freights for lathwood from Frederikstad to London have also had a steady fall. In 1890, 1*l.* 6*s.* was paid; in 1891, 1*l.* to 1*l.* 1*s.*; in 1892, 19*s.* 6*d.*; and in 1893, 19*s.*

Ice trade.

Freights in the ice trade have been lower, but not correspondingly so inferior as those for lathwood. For spring shipments to London, 7*s.* was paid in 1890; in 1891-92, 6*s.* 3*d.*; but in 1893 for big ships, 6*s.*; whilst the average price in smaller vessels was 7*s.* 3*d.*

Australia.

Freights to Australia, which in 1890 fell from 5*l.* (for planed timber from the South of Norway) to the low rate of 3*l.* 12*s.* 6*d.*, reached during 1891 something under 3*l.*, and in August, 1892, fell to 2*l.* There has, nowever, been no further decrease during 1893.

Sweden.

Timber freights from Sweden remained the same as in 1892.

Archangel.

From Archangel to the east coast of England freights were in

1890, 2*l.* to 2*l.* 3*s.*; in 1891, 1*l.* 17*s.* 6*d.* to 2*l.*; in 1892, 1*l.* 15*s.*
No further fall has been recorded.

Freights to Canada have been very low, but still slightly in Canada.
advance of those in the autumn of 1892, and about the same as
those at the beginning of that year.

Fir planks and boards from Miramichi, St. John's, to the west St. John's
coast of England or the east coast of Ireland, freights in the
autumn of 1892 were quoted at 1*l.* 17*s.* 6*d.*, whereas in July and
August, 1893, they had advanced to 2*l.* 3*s.* These freights have,
however, again fallen, and the average for 1893 cannot be reckoned
at more than 2*l.* 1*s.* 3*d.*

Pitch-pine freights from Pensacola have remained firmer than Pitch-pine.
others, the average for 1892 having been 4*l.* 12*s.* 6*d.* At the
beginning of 1893, 4*l.* 7*s.* 6*d.* to 4*l.* 10*s.* was paid in bigger ships,
and 4*l.* 10*s.* to 4*l.* 12*s.* 6*d.* in smaller vessels. During July prices
advanced to 4*l.* 17*s.* 6*d.* for larger vessels. They soon sank, however,
to 4*l.* 12*s.* 6*d.*

In the beginning of 1893, 14 dol. was the freight to Brazil, but
November saw the price reduced to 11 dol. 50 c. to 12 dol.
Freights were the same to Buenos Ayres, but 14 dol. to Rosario.

Although freights to the west coast of America during 1891 West coast of
were so good, they declined in 1892, and even more so in 1893. America.
From Puget Sound to the Continent, 2*l.* 17*s.* 6*d.* to 3*l.* 5*s.* per
standard was paid; to Sydney, 1*l.* 15*s.*

Freights for petroleum in 1893 were as low as in 1892, and the Petroleum.
employment of sailing vessels in that industry has been more and
more curtailed by the necessity of having tank ships. Freights
have ruled generally at about 2*s.* to Great Britain.

Owing to the coal strikes, coal freights to Montevideo reached Coal.
the low ebb of 11*s.* 6*d.*, having been 18*s.* to 19*s.* in 1890; 15*s.* to
16*s.* in 1891; 13*s.* to 14*s.* in 1892.

Steamships cannot therefore be said to have done a brisk trade.

Corn freights from America, which during 2 months in 1892 Corn.
were paying, fell later and were even lower in 1893.

Black Sea freights were on the average low in 1892, but in Black Sea.
September and October they rose very considerably, only to fall as
rapidly. Taken as a whole, in 1893 they were somewhat lower
than in 1892.

North Sea freights were again quoted at a low figure, falling North Sea.
from 1*l.* 3*s.* to 1*l.* 5*s.* from Sundsvall to London, to 1*l.* 2*s.* to 1*l.* 4*s.*
and even to 1*l.* 1*s.*

Coal freights to the Mediterranean which, in 1892, stood at Coal to
10*s.* to 11*s.* per ton from Wales to Genoa, were 7*s.* to 8*s.* in 1891, Mediter-
and 7*s.* in 1892 and 1893, though some vessels got 7*s.* 6*d.* raneean.

Rice freights from the East Indies were somewhat better in Rice.
1893, but rather lower than in 1892, having fallen from 1*l.* 13*s.* 9*d.*
in 1892 to Great Britain, to 1*l.* 12*s.* in 1893.

Freights from the Chinese coast, and the fruit trade from the Chinese coast
West Indies, were about as bad in 1893 as in 1892. fruit trade

Wages remained the same as in 1892, rising as high as from West
55 kroner (2*l.* 19*s.*) for an able-bodied seaman. India. Wages.

Workshops.

The workshops have been busy despite the badness of the times, and orders for ships have been given here as well as in England and Scotland, so there seems no prospect of any panic taking place.

Most of the steamers have made some money, and there can be little doubt that shareholders in the large steamship companies have profited.

General observations.

It will be seen from the above observations that the state of the freight market has been unfavourable to shipping, and it would be difficult to find a year when freights have been at a lower ebb. Still there is reason to believe that an improvement is not far distant.

In 1893, several circumstances combined to reduce freights, but partly, they have now disappeared, and, partly, it is hoped they will yield to brighter prospects. It will be remembered that the state of the timber market was, during the greater part of 1893, bad, and, as a natural consequence, transactions in this important branch of industry were much curtailed. It is to be expected that with better prospects for the timber trade in view, transactions will become brisker and shipping profit thereby. The many long strikes in the coal trade naturally crippled the carrying trade, but it is also hoped that also here there will be a revival.

It would naturally be of great importance if some augmentation in general, international trade was effected, and, it is believed, that the depression so long observed has reached its lowest point. It is held likely that a change will take place if the tariff question is solved, because so long as it remains undetermined, capital and speculation will keep in the background, a fact which naturally must, in a great degree, prevent the introduction of new projects of practical utility.

But, although it is reasonable to hope that freights will rise in the immediate future, it must not be forgotten that the usual tendency of the freight market, if an average be struck, is to fall.

The development in this respect has for a long time been going on with various temporary oscillations, and it is merely a natural consequence of the great progress made in shipping, which has resulted in these days in the cheapening of transport. It is only this fact which repeats itself in various economic branches of industry, and it is on this very development that the future of shipping essentially rests.

*Fisheries.***General results**

Although complaints have been made of the decrease in the fisheries along certain parts of the coast, and although Christiania and other towns have been supplied with fresh fish for daily consumption, yet the great coast fisheries which are engaged in the export trade have succeeded much better than is generally believed to be the case.

In 1893 a new cause of complaint has appeared, not over the indifference of the fishing, but over the large catch of both herrings

and cod. The fishermen complained of the difficulty to sell in Norway, and the merchants at the scarcity of customers abroad.

Although the whole catch exceeded that of an average year, yet its value was only on a par with that of a middling year. This is accounted for by the fact that the great quantity of fat herrings caught in the autumn were sold at a very low figure. This also proved the case with the cod, of which large numbers were taken in the first six months of the year in the various districts between Lister and the Russian frontier. If the value of an average year's catch is reckoned at 1,319,444*l.*, the catch of 1893 cannot be put at a higher figure than 1,305,555*l.*, although the fishing was of actually longer duration. But the bad results obtained in 1893 do not stop here, the real value of the export was rendered much less by the overstocked state of the market, and the value of the exports must be reckoned at least 111,000*l.* below the average.

In conclusion, it must be said that the stock of some of the establishments amongst the larger ones was greater than could be desired at the end of the year, and this will naturally have an effect on the supply in the coming year.

The winter herrings, which are caught off the south coast from the end of October to the beginning of January, seem to be unfailing. As the weather during this period is often unpropitious, it is impossible to put out to sea or to ascertain whether there are many or only a few herrings near land. But the catch of 1893 seems to point to the fact that the herrings which, as in 1892, sought the south coast have not diminished. After the termination of last year's fishing, this winter's fishing began at the usual time during the cold weather that succeeded the new year, and has continued satisfactorily until the end of the year.

There was a certain regularity in the movements of the herrings which the fishermen regard as a good sign; and as it is confidently expected that the herrings will return to their old resorts, it is supposed that the preparations for fishing, as well as for the export, will be carried out with greater care and sense of economy.

As in the districts bordering Sweden it has been understood how to supply the modern demand, it will next be discovered that there are studies to be made in the herring trade, and that the westerners in olden times used the produce of the winter and spring catches for salting, to suit the taste of the Russian and the Polish peasants.

It may further certainly be said that the Norwegian herring fishermen have a good deal to learn before they can compete with any success or lay a claim to the lion's share of exports in this branch of industry.

The winter herring fishery of 1893 brought a good profit to the small fishermen. The total catch amounted to about 250,000 barrels, varying in price from 4*s.* 5*d.* to 6*s.* 8*d.*

The greater part was exported either fresh or smoked.

The spring fishing which was carried on on the west coast

Spring
fishing.

between Lindsnes and Stat began at the new year. Good results were obtained in February, during part of March, and continued in April. The total catch is much inferior in quantity to 1892.

The average price obtained is reckoned at 6s. 4d. or somewhat higher than in 1892. The greater part of the catch was salted for export, but no considerable profit was realised.

Operations on fat herring fishing grounds which reach from Stat to the southern frontier of Finmarken (and even begin south of Stat) commenced at midsummer, and continued in the northern districts until the middle of December.

The abundant catch of 1892 had brought losses to a number of salting establishments, and consequently prices ruled low, directly it was noticed in July and August that, also in 1893, the supply would exceed the foreign demand. In a couple of weeks prices fell from 11s. 1½d. and 16s. 8d. to 3s. 4d. and 4s. 5½d., and later even as low as 1s. 8d. and 1s. 10d. At several fishing stations no buyers were forthcoming, and in consequence the fishing ceased, as it was hardly worth while bringing the salted herrings for domestic consumption into the town.

South of Nordland the results of the fishing were middling; in the prefecture of Nordland about 625,000 barrels were salted, and at Tromsø 60,000 barrels. The total catch for 1893 is estimated at about 800,000 barrels.

Small
herrings and
sprats.

The catch of small herrings and sprats was only about 100,000 barrels. Sprats were in demand and fetched good prices, but small herrings did not find a good market, and sold very cheaply.

Spring and
winter
herring
fishery.

The results of the spring and winter herring fishery in 1893 as well as of the two previous years, are shown in the following table:—

Year.					Quantity.	Value of Catch.
					Tons.	£
1891	..	..	..	..	7,300	180,888
1892	..	..	..	..	7,760	186,111
1893	..	..	..	..	4,200	83,338

The results of all the fat herring fisheries is estimated as follows:—

Year.					Quantity.	Value of Catch.
					Tons.	£
1891	..	..	..	..	5,960	171,277
1892	..	..	..	..	10,500	121,777
1893	..	..	..	..	10,000	111,111

If the value of the catch of the small herring and sprat is added, there is a total of 222,222£. as against 255,555£. in the last 5 years.

The trade with foreign countries did not pay; prices were rather low early in the season owing to big supplies from Holland and Scotland. Trade with foreign countries.

The export price in Norway for the finest fish began at 1*l.* to 1*l.* 2*s.* 3*d.*, but once the fishing was in full operation, prices fell, and picked fish only fetched 8*s.* 11*d.* towards the end of the year.

Shipments were effected from small ports as the store-houses are small, but others, on the contrary, have preserved a stock in the hopes of a rise in quotations. As the exportation to Germany had risen to over 200,000 barrels more than in 1892, *i.e.*, 1,000,000 barrels altogether; it seems that the market there wishes to increase the consumption.

Whilst the Lofoten catch in 1892 was a comparative failure, the results obtained in 1893 were satisfactory. The local fishing began in January, but the catch was poor. The fish were unsettled and shifted backwards and forwards. The fishing grounds were some way out, and the well known wrecks, when about 120 fishermen lost their lives, gave ground for discouragement. Lofoten cod fisheries.*

During February the fishing was successful, and in March even better, and gave great promise had not 3 weeks stormy weather hindered the fishing and caused a number of fishermen to go home.

The total catch is reckoned at 27,000,000 cod, as against 16½ million in 1892, and 21,000,000 in 1891.

The amount of liver was 690 tons, and of roe 311 tons.

The relatively high value obtained was due to the prices fetched by the greater number of the fish; the average price is reckoned at 3*d.* per round fish. The share per man was therefore above the average, being 12*l.* 10*s.* as against 8*l.* in 1892 and 12*l.* 4*s.* 4*d.* in 1891, but it must be remarked that employment in 1893 was much more continual than is often the case.

The Lofoten fisheries must then on the whole be considered successful.

The other cod fisheries on various parts of the coast towards the south gave altogether satisfactory results. Other cod fisheries.

On the coast between Lister and Stat, where a few years ago there was hardly a fish caught the whole winter, the fisheries have improved wonderfully of late years.

In 1893 the number of cod taken was 4,500,000 to 5,000,000. 30 kroner (1*l.* 13*s.* 4*d.*) was paid per 100 round cod (a very fair price), while in Lofoten the average price was 1*l.* 4*s.* 10*d.*

The results obtained off the coast of the province of Romsdal were much less considerable than in the favourable year 1892. A long continuance of bad weather in March hampered the fishing considerably. The total catch was about 6¼ million against 10,000,000 in 1892.

In the district of Trondhjem the catch was about the average, *i.e.*, 1,500,000, and in Nordland, outside the Lofoten grounds, the

* Some particulars in regard to the cod fisheries in Norway in 1893-94, by Mr. T. Michell, C.B., were published in the June (1894) number of the "Board of Trade Journal," p. 700.

fishing was excellent, showing a total of 9,500,000; but the catch on the outside of the Lofoten Islands is here included.

In the district of Tromsö 3,500,000 fish were taken. It is, however, only right to add that from the autumn of 1892 till far into January, 1893, before the usual time for winter cod fishing, a very considerable number of fish were taken in West Finnmarken and in the neighbourhood of Tromsö.

This catch, on account of the size and fulness of the fish found its own market, and it does not correspond with what is known as the Lofoten cod. The exact number of the catch is not known, but is roughly estimated at 4,000,000. Good profits were realised by the people engaged in the fishing in that district.

The cod fishery along the west coast of Finnmarken was, during the first part of the season, unsteady and continued unsatisfactory until the close of the fishery in East Finnmarken when good results were obtained. This is considered the most "capricious" cod fishery and the catch has varied very much.

In 1892 it was good, and produced 22½ million fish, or 6,000,000 more than the Lofoten catch in the same year; but in 1893 positions were reversed, namely 12½ millions, or about one-half of that at Lofoten. Prices which began high, sank low on account of the quantity of fish caught in other localities.

The average price of fish from East Finnmarken was 16s. 8d. per 100 round fish. The aggregate catch of the cod fisheries is estimated at 70,000,000, 1,895 tons of liver, and 700 tons of roe. The catch exceeded by 10,000,000 the average catch of the years between 1888-92. Its value is reckoned at 861,111*l.*, or about 55,500*l.* in excess of the average of the above-mentioned years.

Prices of oil.

Had the prices for oil, which in 1893 at Lofoten and in other localities was valued at 8s. 11d.-11½d. per hectolitre, been those of a good oil year, and had prices for liver, in 1893, been higher (13s. 4d. to 16s. 5½d. as it has often been the case), the value would have been very naturally increased.

Fishermen, however, have no reason to complain about the catch of 1893.

Total of fish, liver, and roe.

The actual quantity of fish, liver, and roe taken at all the fisheries is shown as follows:—

Year.					Fish.	Liver.	Roe.
					Millions.	Tons.	Tons.
1891	..	..	..	..	49·6	1,386	374
1892	..	..	..	..	65·1	1,711	553
1893	..	..	..	..	69·8	1,895	700

Taken as the whole, the trade did not pay. The prices for stock fish (klip fisk) began low, and sank as the condition of foreign markets became worse, viz., from 7s. 3d. to 5s. 10d. per kilo. for really fine goods.

The cod-fish, of which there are so many kinds, varied greatly

in quality; fine fish, which were but few, fetched comparatively high prices (10s. to 11s. 8d.), whilst inferior fishing only realised 5s. 9d. to 6s. 8d.

The price of oil was low during the whole year, namely, 1*l.* 13s. 4*d.* for clear oil, and only 1*l.* 15s. 6*d.* for medicinal oil per barrel.

Roe, on the other hand, commanded better prices, and towards the close of the year 1*l.* 15s. 6*d.* was the quotation for first quality roe.

The other fisheries call for little comment with the exception of the autumn line mackerel fishing which was carried on in the North Sea. 300 vessels were engaged in the industry from July to October and brought in 200,000 barrels of salted mackerel, the greater part of which was exported to America. The value is roughly given at 50,000*l.* The summer mackerel fishing was less successful, but prices kept up, and the value exceeded that of 1892.

Fishing operations on the banks continued during the summer months (May to October), but the catch was not so good as usual, although the weather was fine. However, on some banks a great number of fish were taken.

Salmon and lobster fishing was about the same as in 1892, and good prices were obtained. During the first 11 months of 1893 the following quantities of fish were exported:—

Articles.		Quantity.	
		1893.	1892.
Cod	Kilos. ..	17,593,000	19,714,000
Stockfish	"	54,097,000	45,566,000
Fat herring	Tons	9,800	8,088
Other "	"	2,015	2,151
Roe	"	679	656
Oil	"	2,218	2,148

The loan which was instituted for the advancement of sea fishing has been raised and much used by fishermen, as by its assistance they are enabled to fit out bigger boats and cutters, as well as to procure other means of livelihood, and so to extend production. Thus the loan cannot be considered as anything but materially helpful and likely to influence the development of the industry.

The purchase of better equipments for boats, and the prevention of a want of bait, as well as the preserving of fresh fish for long transport, has been encouraged, partly by premiums.

In the advancement of sale in foreign countries, a fishery agent has been appointed in Germany and a new one in England, after the decease of the last holder.

The organisation of public telegrams concerning the progress and results of the fishing has been subjected to some amendment, (1801)

but similar statements regarding the total quantity produced (including the catch of the minor fisheries) are needed, and it is desired that timely statements about the amount of export from the most important towns should appear.

On the whole, great interest is evinced as regards the progress of the fisheries, but if, nevertheless, the production of the fisheries cannot be said to increase constantly, it is at least commensurate with the condition of the foreign markets upon which so much depends.

One thing which, amongst many others, was thought likely to be effective, namely yearly local and national exhibitions, with lectures, &c., did not prove so in 1893.

An exhibition is proposed to be held in Tromsø this summer. In connection with this, must be mentioned the part that Norway took in the Chicago Exhibition, from which a better market in different parts of America was confidently expected.

Timber Trade.

Timber trade. The year 1893 cannot be regarded as having been favourable to the timber trade. Prices for planed timber to the big ports on the west coast of England were, at the beginning of the year, 7*l.* 7*s.* 6*d.*, but fell after the spring to 7*l.* 2*s.* 6*d.* In October there was a slight rise, which also occurred in the case of Holland, and in prices for sawed timber from the Baltic ports. The stocks in England appear to be reduced, so that the prospects for next year are apparently brighter, but great precaution is necessary as the market is weak. Thus the Australian market is glutted, although it seems that the economical situation there appears brighter, and there is a large residue of stock in Cape Colony, which in the spring of 1893, as in 1892, was a good buyer.

In the first 11 months of 1893, the total export of timber of all kinds from Norway was 1,611,200 cubic metres, as against 1,814,200 cubic metres in 1892. In 1891, during the same period the export was 1,712,300 cubic metres, and in 1890, 1,688,400 cubic metres. Last year's export was the smallest since 1887.

In Sweden, on the other hand, the export of planks, sawn and planed timber, as well as of beams and spars, exceeded that of 1892, but was less than in 1891.

In the first 11 months of each year the export was:—

Year.						Quantity.
						Cubic metres.
1891..	..	..	..	..	..	4,669,000
1892..	..	..	..	..	..	4,199,000
1893..	..	..	..	..	..	4,378,000

In 1893 there was an additional export of 678,000 cubic metres of pit-props, and 16,000 cubic metres of cellulose.

The export from Finland in 1893 also exceeded that of 1892. Finland.
On the other hand it appears that from the above-named States and British North America the timber export of 1893 has been considerably less than in 1892.

In Norway and North America the timber export shows a decrease in 1893, yet in 1892 it exceeded the export of 1891. The reverse was the case in Sweden and Finland.

The following table shows the total quantity of timber exported from Norway during 1893 :—

Description.	Exports during first Eleven Months (Figures denote Thousands of Cubic Metres).		
	1891.	1892.	1893.
Planed wood	495	476	481
Sawn	453	457	439
Hewn	80	98	77
Round wood and props ..	516	611	458
Staves	83	73	82
Lathwood and firewood ..	85	101	74
Total	1,712	1,814	1,611

It will, therefore, be observed that the decrease which the Norwegian timber export shows, occurs in the less valuable kinds. This was also the case in the increase that occurred in 1891-92, when the export of round timber, which in 1892 had increased by 95,000 cubic metres, decreased in 1893 by 153,000 cubic metres. The same was the case with hewn timber.

The export of sawn timber in 1893 has decreased slightly, Sawn timber. whilst that of planed timber has increased, though inferior to 1891.

The same is the case in Sweden, but in a smaller degree.
The export of timber during the first 11 months of 1893 was 234,000 cubic metres, as against 227,000 cubic metres in 1892, and 260,000 cubic metres in 1891.

The import of "boards," *i.e.*, the strongest kind of planed timber, into the London market was during the first 11 months of—

Year.	Lots of 1,000.	
	From Norway.	From Sweden.
1891	5,619	7,401
1892	5,609	7,468
1893	6,177	7,041

The increase in the Norwegian export to London is no good sign, seeing that this export almost invariably consists of shipments on consignment, which for the most part are cargoes of
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timber which would otherwise be unsaleable and which at auctions in London fetch, as a rule, a low figure.

Planed
timber

The export of planed timber from Norway during the first 11 months of the last 3 years, in thousands of cubic metres, are shown below :—

To	Thousands of Cubic Metres.		
	1891.	1892.	1893.
Great Britain and Ireland ..	311	329	356
Holland.. .. .	57	70	61
Belgium	6	3	3
France	40	3	3
Spain	9	16	6
Australia	88	22	26
Africa	18	26	21

France and
Belgium.

France, therefore, plays but a small part since the enforcement of the prohibitive tariff of February 1, 1892, and the export to Belgium has likewise fallen off since that date.

Spain.

The export of timber to Spain has diminished considerably in 1893, but a change is expected directly the commercial treaty comes into force on January 1, 1894. It is thought that the Norwegian and Swedish timber export will benefit to the cost of Finland, in that the duties on Finnish timber are almost prohibitive. Negotiations are in progress between Russia and Spain with a view to diminish the duty on timber, but as a Finnish paper sagely remarks, "The Emperor's judgment has not the life-interests to watch over as the Duchy."

Staves.

For staves, the prices throughout the year were bad.

Deals.

The prices for deals have been so low that they have brought no gains to the planing works.

Price of
timber.

Timber was sold at midsummer and after the autumn at 26 kroner (1*l.* 9*s.* 1*d.*) per dozen for spruce fir, and at 28 kroner (1*l.* 11*s.* 1*d.*) for red fir, first quality. After the autumn, so large was the supply of timber, that prices in December did not exceed 26 kroner (1*l.* 9*s.* 1*d.*) for both spruce and red fir, that is to say 1 kroner to 2 kroner (1*s.* 1*d.* to 2*s.* 3*d.*) less than in 1892, whilst there had been a similar fall in 1891.

Planed Wood
Association.

The association for the export of planed wood, which was started at the end of 1892, did good work. No reduction in production was advised, but, on the other hand, it gave good, sound practical suggestions.

Exporters'
syndicate.

A syndicate of exporters of planed and sawn timber in the district between Skien and Christiansand is now in the course of being formed.

Wood-pulp Industry.

Prices for wood-pulp in 1893 have shown a continual rise. Buyers who were behind-hand in their settlements for 1892, in

the hope that they would be able to overcome the efforts of the makers to raise prices, were, in general, after the limitation in production (two-thirds of the normal quantity), eager to settle, and on January 1 nearly 130,000 tons of the production of 1893 were sold.

Prices opened at 35 kroner (1*l.* 19*s.*) for wet, and 73 kroner (4*l.* 1*s.*) for dry, but advanced quickly to 36 kroner (2*l.*) and 75 kroner (4*l.* 3*s.* 3*d.*). The charges for supplies of wood-pulp quoted in February at Stockholm, namely, 40 kroner (2*l.* 4*s.* 6*d.*) for wet, and 80 kroner (4*l.* 9*s.*) to 85 kroner (4*l.* 14*s.* 6*d.*) for dry, were normal prices. At a meeting held in August, quotations were 42 kroner (2*l.* 6*s.* 9*d.*) for wet, and 85 kroner (4*l.* 14*s.* 6*d.*) to 90 kroner (5*l.*) for dry. Some small lots during the last months of the year fetched 55 kroner (3*l.* 1*s.* 2*d.*) to 110 kroner (6*l.* 2*s.* 1*d.*).

The resolution to limit the supply in 1893 contributed considerably to strengthen the market, but it appeared, as indeed already was the case, on account of the increased consumption, that the measure would be less useful than effective. At a meeting held in May, the wood-pulp manufacturers decided that the limit should be reduced from 33½ per cent. to 23½ per cent. on the normal quantity, and in August this limitation was entirely done away with.

This good state of the market has brought about the construction of new wood-pulp manufactories. If this should continue the wood-pulp industry will run considerable risks.

The consumption of wood-pulp has been much the same as usual in Norway, but the demand for it in England has increased. The export to France was somewhat larger, but this increase is no proof of a larger demand, as the import in 1892 was below the normal.

France had, indeed, at the beginning of the year, a large stock on account of the enforcement of the new customs.

Germany imported a considerable quantity more wood-pulp in 1893 than in 1892, greatly because the factories in Germany could not work on account of the want of water power.

Most of the other countries to which wood-pulp is exported took the same as usual.

Only one new mill was in operation in 1893. Several others will be finished and ready early in 1894.

Norway has at present 59 wood-pulp factories working. Of these one is connected with the manufacture of buckets, three with the manufacture of cardboard, and ten with the manufacture of paper.

The total export of mechanical wood-pulp (inclusive of the article shipped from Sweden) amounted in the first 11 months to —

Number of
factories in
Norway.

Total export.

Year.						Quantity.
						Tons.
1891..	..	..	..	..	..	230,000
1892..	..	..	..	..	..	215,000
1893..	..	..	..	..	..	230,000

Total value. The total value may be estimated at 8,500,000 to 9,000,000 kroner (480,000%).

Cellulose. The rapid increase in the use of cellulose, produced by the prohibition to import rags in the various countries infected by cholera in 1892, made prices rise, and the cellulose industry has on this account, and in conjunction with several other favourable circumstances, been remunerative in 1893 :—

Prices.

Description.	Currency.		Sterling.	
	From—	To—	From—	To—
	Kroner.	Kroner.	£ s. d.	£ s. d.
For 1st quality dry sulphite	200	210	11 2 2	11 11 4
2nd " "	185	195	10 5 7	10 16 8
1st " sulphate	180	190	10 0 0	10 11 2
2nd " "	170	180	9 9 10	10 0 0

These prices cannot long be maintained and a considerable fall is inevitable. A quantity of manufactories are in course of construction in Sweden, Norway, and America, and a large over-production is to be expected. Of the cellulose manufactories now at work to turn out the sulphite and the sulphate cellulose, three of the former and two of the latter are connected with the manufacture of paper.

The total export of cellulose, for the first 11 months of the year, was :—

Description.						Quantity.
						Tons.
Dry ..	..	..	..	..	..	28,000
Wet ..	..	..	..	..	..	13,000

as against in 1892 :—

Description.						Quantity.
						Tons.
Dry ..	..	..	..	..	..	22,000
Wet ..	..	..	..	..	..	9,000

Value, 6,000,000 kroner to 6,500,000 kroner (about 33,000%).

Paper.

It had been generally expected that the higher prices for raw material would have brought about a rise in the price of paper, but the amelioration which has been observable in some kinds of paper has not kept up with that in the wood-pulp and cellulose trade. The manufacture of paper has in 1893 outgrown the demand, and there is great competition on account of over-production, which thus keeps prices from rising.

It cannot be said, therefore, that the year 1893 was favourable to the paper trade.

During the year one paper mill was burnt down, but is being rebuilt on a bigger scale.

No new mills have been constructed since 1892.

Ice Trade.

The result of the ice trade may be said to have been satisfactory, since it may be considered to be equal to that of an average year, and slightly above it. General results.

The hard frosts and strong colds prevented the cutting of ice, but the spring came early, and as access to the Christiania fjord was much impeded by sea ice the warm weather spoilt much of the ice in the ponds and lakes.

Prices which stood in the previous year at about 1 kroner (1s. 1½d.) per ton, f.o.b., rose, therefore, towards the month of March, to fall again after the spring. London bid only 7s. 6d. for spring shipments, 8s. 6d. for the next voyage, and 10s. or 10s. 6d. for the rest of the year, and even at that price it was difficult to sell ice, for the agents were clever enough to distribute their orders round the coast. Prices.

At the beginning of April, however, a rise took place, and 11s. was paid to Gravesend, and the same was the case as regards the chief Irish harbours, where fishing was successful and required ice.

Towards September and October came demands from abroad, but as the supply was somewhat small the quotations at the beginning of November were 16s. c.i.f. to London, 16s. 6d. to Ramsgate, and 15s. 6d. to Grimsby, and 10 kroner (9s.) per registered ton was obtained.

The November frosts came early, and fresh ice could be shipped in the middle of the month to Grimsby and other harbours. This caused prices to fall to 8s. 6d. to the east coast. The ice-houses were almost entirely emptied, and small quantities of old ice were sold on the Continent at 11s. to 12s. c.i.f.

Cotton Industry.

The Norwegian industry has worked under somewhat varied circumstances during 1893. Norwegian industry.

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The import of cotton during the first 11 months of 1893 was 2,143 tons, as against 2,666 tons during the same period in 1892, and 2,108 tons in 1891. Prices have had a downward tendency. The market has been unsteady, constant rises and falls being registered, but after the various statements concerning the largeness of the crop confidence was restored. The official quotations in Liverpool, which in March, 1892, after the fine crop of 9,000,000 in 1891 had reached the abnormally low figure of $3\frac{1}{16}d.$ for medium American, had, towards the beginning of 1893, risen to over $5d.$, but sank again to $4\frac{1}{4}d.$ towards the end of the year, despite the fact that it was unknown whether the last crop would exceed 7,250,000 bales, which is the ordinary world's consumption of American cotton. It is, therefore, natural that cotton spinners, seeing the unsteady prices of raw material, ran a considerable risk in laying in stock.

Spindles.

The cotton spindles have as a general rule worked evenly throughout the year. The sale of yarn has, despite the lowness of prices, been less than usual. The exportation of cotton yarn during the first 11 months of 1893 reached only 71 tons, as against 105 tons during the same period in 1892. The total export of cotton yarn in 1892 was 136 tons, of which 114 tons went to Denmark, and 22 tons to Sweden.

Import of cotton yarn.

The import of cotton yarn, bleached, was, in 1892, 893 tons, of which 291 tons came from Sweden, and 582 tons from England.

It is to be expected that the import of yarn in 1893 will be somewhat smaller on account of the limited activity of the Norwegian weaving establishments. The imported yarn is of somewhat finer texture than that generally used by Norwegian weavers.

Looms.

The mechanical cotton looms have worked under difficulties during the year owing to a lack of demand. Some looms have been idle all the year.

The export to Sweden, which demands bright-coloured goods, has been less than usual, and the same complaint as to the want of buyers has been made.

No other markets are open for this article.

The importation of cotton yarn has, on the other hand, not diminished. In 1892 it was 2,000 tons, or 74 tons in excess of 1891.

The diminution both in import and export of cotton goods in 1892 points on the one hand to the exchange of goods between Sweden and Norway in this industry where no duty is placed on native manufacture. On the other hand, it will be seen how difficult it is to keep pace with the great production in England and Germany under the Norwegian customs tariff, and the direct communication that exists between foreign ports and the northern and western coast of Norway.

Export of cottons.

In 1892 the export of cotton articles amounted to 334 tons, of which 229 tons were of various colours, 4 tons of bleached, 27 tons of unbleached, and 74 tons unspecified.

Import of yarn.

The import of cotton yarn in 1892 reached 1,999 tons, of which 609 tons were unbleached, 733 tons bleached, 498 tons unprinted, and 159 tons printed.

The following quantity was imported :—

From—				Quantity.	
					Tons.
Sweden				Unbleached ..	355
				Bleached ..	102
				Coloured ..	320
				Printed ..	23
England				Unbleached ..	236
				Bleached ..	498
				Coloured ..	130
				Printed ..	70
Germany.. .. .				Unbleached ..	12
				Bleached ..	105
				Coloured ..	34
				Printed ..	57
Denmark				..	16
Holland				..	21
Belgium				..	8
France				..	2

Woollen Industry.

The industry in woollen goods, both in Norway and Sweden, has been satisfactory, though prices have been low. The sale has been slightly larger, and factories have been busy nearly all the year. The stock in hand, however, is less than at this period in 1892. The factories that prepare cheviots and suitings have on the whole been quiet, though trade was brisk, but prices ruled low.

It is noteworthy that the Norwegian stuffs for clothing are winning favour on account of their good appearance, quality, and cheapness. The import rather increases than diminishes, as will be seen from the figures given below. The duties levied on woollen goods amounted to 1,000,000 kroner (55,555*l.*). The relatively favourable customs tariff in Norway is of advantage to both buyers and manufacturers, as the latter can deliver their goods cheaper than foreign countries, which are obliged to levy duty, and where competition tends to lower prices. The export of woollen goods in 1892 amounted to 526 tons, of which 525 tons went to Sweden.

Import in 1892, 1,378 tons, of which 272 from Sweden. Import, 1893 (January to November), 1,347 tons.

Jute and Hemp.

The Norwegian jute manufactory was fully busy during 1893, Jute. lack of water-power alone causing an interruption late in the year.

Business was paying during the first months, but the unexpectedly bad harvest in India caused a considerable advance in the price of the raw material during the summer, and foreign competition has also since affected the trade.

Hemp.

The Norwegian rope-making has followed the depression of shipping amongst the fishing population of the north, which employs numerous rope-makers. Business was very limited.

Year.	Import of—	Quantity.
		Tons.
1892	Hemp	2,644
	Flax	91
	Jute	718
1893 (January to November)	Hemp	2,593

Breweries.

The number of breweries (46) was not increased. Business has been satisfactory.

Barley.

The average price for barley was 2 kroner 30 ore (2s. 6d.) per 100 kilos., a lower price than in 1892, whereas the price of hops was 1 kroner (1s. 1½d.) per kilo. higher.

Malt.

The preparation of malt is estimated at:—

Year.	Quantity.
	Tons.
1890-91	14,186
1891-92	13,209
1892-93	12,046

and from September to November:—

Year.	Quantity.
	Tons.
1891.. .. .	3,673
1892.. .. .	2,968
1893.. .. .	3,741

The importation of malt was during the first 11 months of the year:—

Year.	Quantity.
	Tons.
1891.. .. .	3,040
1892.. .. .	3,208
1893.. .. .	3,822

The consumption of ale was in 1892 reckoned at 20·6 litres per head. The export of ale was :—

Year.						Quantity.
						Hectolitres.
1891..	..	..	..	..	..	8,044
1892..	..	..	..	..	..	4,966
1893..	..	..	..	..	..	4,286

The export has been decreasing, and prospects are not bright.

The trade in Norway will, it is thought, continue much the same as usual.

Stone.

The quantity of hewn stone shipped in 1893 has been about the same as in 1892, namely, 45,598 tons, valued at 821,000 kroner (45,611*l.*).

A syndicate was formed with the idea of trying to prevent over-production and to keep up prices. This association has not been well viewed abroad, as several foreign agencies have combined with the smaller exporters who did not wish to join the syndicate. The consequence is that the association is out of the field, and it is to be deplored that so remunerative a Norwegian industry should be rendered nil by such senseless competition. The syndicate is well aware of the danger, and there has been a meeting, the result of which is at present unknown.

Tobacco.

This branch of industry has continued much the same as in past years, but it is worthy of note that the use of tobacco, on account of the somewhat worse economical condition throughout the country, has been less in 1893 than in 1892, when it was 0·84 kilos. per head. Since the introduction of the higher duty the consumption has fallen from its maximum 1 kroner 20 öre to 80 öre per head. The import was for the first 11 months of—

Year.						Quantity.
						Tons.
1891..	..	..	..	..	..	1,702
1892..	..	..	..	..	..	1,710
1893..	..	..	..	..	..	2,328

Mining.

In 1893 the mines in Norway were worked under very unsatisfactory conditions. Most of them experienced losses, and it is General condition.

is only the hope that better times will come that has prevented them from closing altogether. This applies especially to Norwegian copper mines, which occupied the most prominent place in that branch of the national industry. Since the French syndicate broke down, the prices of copper were never so low as in 1893. When we consider the burthens that recent laws have laid upon that industry, we may expect that, unless prices improve, most of the mines will stop working.

Copper
mines:
Roros.

The year was a difficult one for the Røros mines, which gave no profit, and it is considered doubtful whether the management of it can show a balance. The Muggruben, one of the principal mines of the works, were stopped already in June, as it was not considered possible to deliver ore from it at the low prices that prevailed. Later the directors found it necessary to reduce wages by about 10 per cent. On the other hand the working of the Storvårts Grube, the other most important mine for copper ore was somewhat forced.

At the smelting-house at Røros all the processes were continued in 1893. The production is returned at 500 tons refined copper.

Meraker
Mine.

The Meraker Mine, after being worked for nearly 200 years, limited its operations last year to such an extent that it can be closed entirely at any time. It has been, however, arranged that at the Lillefjeld, the most important shaft, the work can be resumed at any time when circumstances are more favourable. In 1893 it produced 950 tons of copper ore and 50 tons of copper.

Ytteröen
Mine.

The well-known mines at Ytteröen were kept closed in 1893, the Norwegian firm that purchased it from the English proprietors not having sufficient capital to make the necessary trial shafts. In the first half of the year about 1,000 tons of pyrites were produced by 12 men.

Killingsdal
Mine.

A considerable export of pyrites can be reckoned upon from the Killingsdal Mine when deep sinkings have demonstrated the correctness of previous reports. Forty men raised 6,500 tons of pyrites during the year.

Esna Mine.

At Esna Mine, in Tysdalen, a series of diamond borings were made to ascertain the extent of this interesting discovery of copper ore. A lode of 9 metres was traced, with ore of more or less good quality. About 30,000 tons is the valued weight of those works.

Foldal Mine.

As there appears to be little chance of attracting foreign capital to this enterprise, the question has again been raised of constructing a line between the mines and Lilleelvedal Station, in order to render possible their working for Norwegian account.

Asmdal
Mine.

This was for a series of years in English hands, but in 1893 it was sold to Norwegians, who for the present confine themselves to small operations.

Sulitelma
Mine.

At the Sulitelma Mines large experimental borings were made. At Balmi River complete dressing works produce daily 60 tons. At the same place a smelting and a roasting house, with a water-jacket oven from Messrs. Fraser and Chalmers, is being put up.

The railway between the Övre Vand and the Langvand is in operation, and 10,000 tons of pyrites were transported. The works for 1894 are estimated to produce 30,000 tons of ore and pyrites.

The Bosmo Mines, in Ranen, have been put under a rational Bosmo Mine. system of working. The atmospheric railway is nearly ready, and fine washing works are in construction, so that there will be a good export of pyrites in 1894 from this place.

These works produced about 25,000 tons of pyrites in 1893, Vigsnæs works. from the old stock in the upper part of the mine.

The position of the Kongsberg silver mines continues to be Silver : Kongsberg. critical, but far from hopeless. It is to be hoped that with the withdrawal of the Sherman Bill the price of silver will become more steady, and that plans can be made with greater safety for the future productiveness of silver mines. It is certain, however, that the works encounter a mass of difficulties. Great alterations are necessary, including the use of ore, now considered worthless. This will cost money; but it must be remembered that the works have a reserve, or "drift" fund, in order to meet such eventualities. The following table shows the operations of the last three years:—

Years.	Production of Fine Silver.	Income.	Surplus or Loss.	Applied to Extensions.
	Kilos.	£	£	£
1890-91 ..	4,661	42,906	+ 9,158	4,774
1891-92 ..	4,773	30,205	— 8,635	5,431
1892-93 ..	4,795	27,913	— 7,386	5,117

The deficit comes out of the interest on the working capital which amounted in 1892-93 to 9,796*l*.

As last year, the production of silver was estimated at 4,600 kilos. The average price was put down at 100 kroner per kilo., but was lowered to 90 kroner (5*l*), or to yield for the total probable production a sum of 23,000*l*. It is impossible to say now the amount that will be realised, the price of silver having fallen to 84 kroner per kilo.

The Svenningdal Mines, at Vefsen, produced a total of 300 tons Svenningdal Mines. of ore, at a cost of about 3,000*l*, 47 men being employed.

The Bommeløens Mine continues to make trial sinkings. It is Gold. to be hoped that Mr. John Dawe, the company's energetic engineer, may find more capital and prove to the world that there is gold at Bommeløen in sufficient quantity for profitable working. In 1893, 1,750 tons of quartz were crushed and 12 kilos. of gold obtained.

The Ringerike Nickel Works were not in operation last year, Nickel : Ringerike works. but towards the close of it preparations for their resumption were made.

The Evje Nickel Works were in 1893 about the same in extent Evje works. and with the same production as in late years. They are leased by an English firm.

- Zinc: Sande. The zinc works in Sande show no production of any consequence in the past year. Prices were low, and the number of men employed was considerably reduced.
- Apatite: At Ödegaardens Apatite Works there was no production under Ödegaarden. the French company which owns them. In the latter part of 1893 the works were somewhat extended.

Agriculture.

- General results. In 1893 the spring was very favourable and hopes were entertained of a good year. These were considerably lessened in the southern and western districts, including Stavanger, by the long drought and great heat which lasted until midsummer, when rain began to fall. The harvesting was done under favourable conditions. The result in those parts of the country was that hay was somewhat under the general crop, while corn and potatoes gave a good profit, and all the products were of good quality.
- In provinces. In the Prefectures of Bergen, Romsdal, and Trondhjem the harvest was very satisfactory.
- No favourable results for 1893 are to be recorded from the province of Tromsö, which suffered considerably in 1892.
- The Prefect of Nordland reports that the bad weather in summer and autumn had destroyed not a small part of the crops and hindered the development of the remainder.
- In the Prefecture of Finmarken the frost did much damage to potatoes, but the crop of hay may be regarded as satisfactory.
- Dairies. Dairy farming was only middling. Owing to competition with margarine it is more and more difficult to dispose of second class butter ("dairy butter") and general, "peasants butter" at acceptable prices.
- Milk-condensing. The milk-condensing companies have had a bad year. The factories at Hamar and Sannesund have limited their working considerably, and those at Toten and Drammen have scarcely been worked at all.

Trade of Christiania.

The Central Statistical Bureau has, in anticipation of its report, obligingly communicated to me the figures given in the following returns of principal articles of import to and export from Christiania. They show an increase of 55,972*l.* in imports and of 119,205*l.* in exports over 1892.

It is scarcely satisfactory to find an increase of little more than 9 per cent. in the value of the imports and of about 7 per cent. in that of exports.

The city has grown to 167,000 inhabitants.

I also annex a return of British shipping and of the direct and indirect shipping trade between Great Britain and this port.

RETURN of Principal Articles of Import to Christiania during
the Years 1892-93.

Number.	Articles.	1892.		1893.	
		Quantity.	Value.	Quantity.	Value.
		Tons.	£	Tons.	£
1	Cereals and meal	96,775	796,005	95,530	649,217
2	Meat, salted	3,682	73,833	6,099	110,517
3	Bacon	4,791	175,850	3,219	143,994
4	Sugar	11,110	203,200	12,398	229,500
5	Syrup and molasses	3,260	27,172	3,176	24,700
6	Coffee	4,923	410,239	5,194	461,644
7	Tea	40	4,645	42	4,928
8	Salt	7,897	5,756	9,692	7,539
9	Tobacco, in leaf	1,224	68,028	1,820	106,166
10	Wine, in casks	732*	40,661	612‡	32,294
11	Alcohol, brandy, &c.	426†	40,533	414§	40,861
12	Cotton—				
13	Raw	2,240	93,355	2,007	89,216
14	Yarn	803	80,578	770	78,011
15	Goods	1,810	165,050	1,374	175,922
16	Wool—				
17	Raw	319	40,722	360	42,028
18	Yarn	326	69,889	398	86,628
19	Goods	955	324,917	992	329,183
20	Jute, flax, hemp, &c.—				
21	Raw	1,733	39,217	2,458	50,078
22	Yarn	193	18,172	167	16,783
23	Cordage	323	11,955	290	10,700
24	Goods, other	552	44,006	1,035	73,806
25	Silk goods	30	49,983	26	44,750
26	Colours and paints	3,017	32,189	3,202	35,806
27	Paper hangings, &c.	3,782	76,483	3,718	76,050
28	Petroleum, paraffin, &c.	12,967	79,244	12,064	67,022
29	Oils, other, varnishes, &c.	4,569	111,361	4,642	112,372
30	Machinery and locomotives	...	2,922	...	20,939
31	" agricultural	...	9,866	...	15,711
32	" other, and parts of	...	112,594	...	136,678
33	Metals, raw, and half manu- factured—				
34	Pig iron	7,968	21,689	9,332	24,693
35	Steel	1,249	15,267	1,734	20,228
36	Red and hoop iron, &c....	18,915	135,350	18,212	128,516
37	Iron plates	5,374	39,733	7,132	47,617
38	Copper, zinc, lead, and tin, raw and worked	2,023	68,578	1,875	57,139
39	Iron, manufactured—				
40	Rails	6,918	42,277	6,440	39,856
41	Wire, steel, and iron	1,524	15,239	1,774	16,750
42	Nails, bolts, &c.	697	9,300	530	6,778
43	Tools and instruments	960	68,617	617	44,572
44	Pipes, &c., forged and cast	4,019	33,489	4,355	38,385
45	Anchor and chains	369	4,911	290	3,872
46	Coals, cinders, and coke	396,324	242,200	386,480	240,478
47	Other goods	...	2,095,275	...	2,105,217
48	Total	...	5,990,300	...	6,046,272

* Plus 22,132 imperial gallons in bottles.

† " 5,148

‡ " 25,706

§ " 5,085

RETURN of the Principal Articles of Export from Christiania during the Years 1892-93.

Number.	Articles.	1892.		1893.	
		Quantity.	Value.	Quantity.	Value.
		Tons.	£	Tons.	£
1	Fish, fresh (salmon)	146	11,389	123	9,933
	Herrings—				
2	Fresh	4,835	14,772	2,917	8,100
3	Smoked	567	3,777	411	3,650
4	Salted	4,300	20,517	4,454	21,483
5	Cod and other fish, salted and dried	414	6,528	339	5,311
6	Butter, Norwegian... ..	158	17,122	139	14,711
7	" margarine	2,012	122,961	1,677	102,472
8	Milk, condensed	1,701	72,753	1,933	82,700
9	Oats	45	289	5,952	33,087
10	Skins, seals	153	7,633	106	4,400
11	" and hides, other	585	47,089	401	41,639
12	Timber	93,905	173,433	81,362	162,222
13	Wood-pulp, dry	8,512*	234,967	7,872†	317,889
14	" " wet	24,655†		27,873†	
15	" " cellulose, dry	12,667†		7,498**	
16	" " " wet... ..	3,822§		4,442††	
17	Matches	4,231	89,322	3,973	83,875
18	Paper, packing	9,035	90,350	11,606	116,056
19	" boards of wood-pulp	1,048	8,150	1,158	9,011
20	Ice	61,841	6,872	69,876	13,633
21	Stone, hewn	1,467	1,467	1,342	1,333
22	Nails, horse-shoe	4,710	112,505	4,592	102,044
23	" other	3,796	35,856	3,617	36,172
24	Goods, other... ..	...	666,918	...	689,151
	Total	...	1,744,700	...	1,863,905

* Of which 5,057 tons, Swedish.
† " 5,371 "
‡ " 558 "
§ " 10 "
|| " 5,852 "
¶ " 7,408 "
** " 833 "
†† " 38 "

RETURN of all British Shipping at Christiania during the Year 1893.

ENTERED.

Nationality.	Steam.		Sailing.		Total.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.
British	143	120,737	22	4,849	165	125,586

CLEARED.

Nationality.	Steam.		Sailing.		Total.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.
British	143	120,737	22	4,849	165	125,586

RETURN of British Shipping at the Port of Christiania in the Year 1893.

Direct Trade in British Vessels from and to Great Britain and British Colonies.

(1801)

Entered.										Cleared.									
Total Number of Vessels.					Total Tonnage.					Total Number of Crews.					Total Value of Cargoes.				
With Cargoes.		In Ballast.		Total.	With Cargoes.		In Ballast.		Total.	With Cargoes.		In Ballast.		Total.	With Cargoes.		In Ballast.		Total.
123	5	128	97,502	2,945	100,447	2,835	£	...		128	13	141	97,599	11,695	109,284			3,031	£
																			...

Indirect or Carrying Trade in British Vessels from and to other Countries.

Entered.										Cleared.												
Countries whence Arrived.		Number of Vessels.			Tonnage.			Number of Crews.	Value of Cargoes.	£	Countries to which Departed.			Number of Vessels.			Tonnage.			Number of Crews.	Value of Cargoes.	£
		With Cargoes.	In Ballast.	Total.	With Cargoes.	In Ballast.	Total.				With Cargoes.	In Ballast.	Total.	With Cargoes.	In Ballast.	Total.						
Russia	...	12	2	14	14,072	1,768	15,838	295	...	...	Russia	...	...	...	...	...	...	1,592	...	36	...	
Sweden	...	1	2	3	198	1,012	1,210	35	...	...	Sweden	...	...	...	...	...	...	2,078	...	44	...	
Norway	...	5	5	5	2,422	...	2,422	60	...	...	Norway	...	...	...	...	...	...	3,286	...	122	...	
Denmark	...	...	6	6	...	2,659	2,659	60	...	...	Denmark	...	...	...	...	...	...	...	...	...	...	
Germany	...	6	1	7	1,614	186	1,800	59	...	...	Germany	...	...	...	...	...	...	1,342	...	23	...	
Holland	...	...	...	...	...	...	...	...	...	...	Holland	...	...	...	...	...	...	...	...	...	...	
Belgium	...	...	...	...	...	194	194	8	...	...	Belgium	...	...	...	...	...	...	657	...	25	...	
France	...	1	1	1	1,096	...	1,096	20	...	...	France	...	...	...	...	...	...	4,143	...	94	...	
Miscellaneous	...	1	...	1	...	...	1,096	...	...	...	Miscellaneous	...	...	...	...	...	...	597	...	42	...	
Total	...	26	11	37	19,596	5,643	25,239	538	...	...	Total	...	...	...	11	14	25	6,950	...	386	...	

C

Arendal (Vice-Consul Kallevig).

- Trade.** For this district the past year has been very unfavourable. The principal trades here—shipping and timber (sawn and round)—have both suffered considerable depression.
- Timber.** Towards the end of the year, however, prices for sawn wood advanced somewhat and considerable quantities were sold.
- Freights.** Freights began low, and have not risen, and shipowners have lost money.
- Wood-pulp.** The trade in this article has been brisk and fair profits have been realised. The greater proportion was exported to Germany and France.
- Fish.** Salmon and lobsters have been in great demand and large quantities have been shipped to the Continent. Lobsters have fetched especially high prices.
- Ship-building.** Despite the general depression in trade, several vessels, both iron and wooden, have been built and sold. The lowest price for wooden ships was about 8*l.* per registered ton fully outfitted and coppered. Iron vessels cost slightly more. These latter are built at Fevig, about 7 miles from Arendal. The business was started and is owned by a British firm, but all the hands employed are Norwegians.
- Coals.** The import of coal has been about the average. Prices have, however, ruled low, and steamers will find it profitable to call at Arendal to coal. The harbour is one of the finest along the coast.
- Steam routes.** Great facilities are offered to tourists; as weekly boats run from the Tyne (on Fridays) and from Grangemouth (on Thursdays).

RETURN of Principal Articles of Export to Great Britain from
Arendal during the Year 1893.

Articles.					Quantity.	
Timber	..	..	..	..	Cubic metres	50,785
Sealskins	..	..	..	..	Tons	131
Feldspar	..	..	..	..	"	91
Old metal	..	..	..	..	"	81
Lead	..	..	..	..	"	20
Old rope	..	..	..	..	"	10
Cows' hair	..	..	..	..	"	4
Fish, fresh	..	..	..	..	"	2
Herrings, fresh	..	..	..	..	"	230
Bottlenose oil	..	..	..	..	Barrels	753
Boats	..	..	..	..	Pieces	23

RETURN of Principal Articles of Import from Great Britain to
Arendal during the Year 1893.

Articles.				Quantity.	
Coals	..	..	..	Tons	12,210
Iron plates	..	..	..	..	526
Steel	..	..	..	..	340
Anchors and chains	..	..	..	..	294
Iron	..	..	..	..	292
Pig-iron	..	..	..	..	271
New metal	..	..	..	..	128
Nails	..	..	..	..	37
Cordage	..	..	..	..	20
Lead	..	..	..	..	19
Soda	..	..	..	..	9
Felt	..	..	..	..	8
Ventilators	..	..	..	..	2

RETURN of all Shipping at the Port of Arendal during the Year
1893.

ENTERED.

Nationality.	Sailing.		Steam.		Total.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.
British ...	...	...	...	...	...	...
Norwegian ...	89	40,687	98	55,191	187	95,878
Total ...	89	40,687	98	55,191	187	95,878

CLEARED.

Nationality.	Sailing.		Steam.		Total.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.
British ...	...	...	...	...	...	...
Norwegian ...	120	42,837	65	41,449	185	84,286
Total ...	120	42,837	65	41,449	185	84,286

Bergen (Vice-Consul Gran).

The trade of Bergen during the past year has not been Trade. encouraging, but upon the whole it has had a better aspect, and there appears to be a greater confidence and a disposition to enter upon new undertakings.

The scarcity of money that prevailed in 1891 and 1892 was Money hardly perceptible, and the money market was firm, the discount market. rate varying from $4\frac{3}{4}$ per cent. to 5 per cent.

The total catch of the cod fisheries was one of the largest ever Fisheries. recorded, namely 64,500,000, of which number 50,500,000 were
(1801) c 2

prepared as split cod "klip-fisk," and about 14,000,000 as round fish (stock fish). In 1892 the total was 62,000,000, of which 44,200,000 were prepared as "klip-fisk" and 17,800,000 as stock-fish.

The earlier part of the season was in favour of the exporters, but during the summer months the continually declining state of the markets, combined with the falling rates of exchange, brought the exporters unexpected losses. Although during the latter part of the year a more even condition was noticeable, yet there can be little doubt that the result, taken as a whole, was not particularly satisfactory.

The export of split cod from Bergen has been on the increase during the last few years; in 1881 it amounted to 18 per cent. of the total export from Norway, in 1888 it had risen to 31 per cent., and this year it was at least 40 per cent.

The export of split cod was about 22,500,000 kilos. (22,500 tons) against 17,700,000 kilos. (17,700 tons) in 1892.

Of round fish 9,025,000 kilos. (9,025 tons) were exported as against 9,200,000 kilos. (9,200 tons) in 1892.

Cod-liver oil.

The export of this article is one of the largest recorded, namely 71,700 barrels as compared with 70,000 barrels in 1892.

At the beginning of this year the following prices were quoted:—

Description.	Per Barrel.	
	Currency.	Sterling.
	Kroner.	£ s. d.
For medicinal	33	1 16 8
refined	31	1 14 6
brown, refined.. ..	30	1 13 4
brown	26	1 8 11

but the prices gradually fell as follows:—

Description.	Per Barrel.	
	Currency.	Sterling.
	Kroner.	£ s. d.
For medicinal	31.50	1 15 0
refined	29	1 12 3
brown, refined.. ..	27	1 10 0
brown	24	1 6 8

The result for the dealers in this article was not very favourable.

Roe.

The quantity of roe was estimated at about 50,000 barrels. Prices commenced at:—

Description.	Per Barrel.	
	Currency.	Sterling.
	Kroner.	£ s. d.
For first quality	26	1 8 11
second quality	16	0 17 9

but as the new supply arrived prices fell to :—

Description.	Per Barrel.	
	Currency.	Sterling.
	Kroner.	£ s. d.
For first quality	23	1 5 7
second quality	13	0 14 5

Owing to the favourable reports on the prospects of the French sardine fishery, the prices advanced and the remainder was realised at 34 kroner (1*l.* 17*s.* 9*d.*) for first quality, and 26 kroner (1*l.* 8*s.* 11*d.*) for second quality per barrel.

The total export amounted to 50,200 barrels as against 46,700 barrels in the previous year.

The catch of fat herrings was even larger than in 1892, and ^{Herrings.} prices about on an average. The result for the exporters was, therefore, on the whole satisfactory.

The catch of spring herrings was smaller than in 1892. Showing a total of 60,000 barrels as against 90,000 barrels. The demand for this particular kind of fish has fallen off considerably, and exporters suffered heavy losses.

Of fat herrings the quantity taken was 750,000 barrels, the amount in 1892 being 700,000 barrels.

The export of fat herrings from Bergen amounted to about 380,000 barrels, an increase of 50,000 barrels on the previous year.

Owing to the moderate and even imports, business in this ^{Salt.} article was more satisfactory than it has been for several years.

The import was considerable, owing to the cheap prices, and ^{Grain.} also on account of the smaller import in the previous year. Importers, however, made little if any profit. Most of the grain arriving at Bergen was carried in British ships.

Although the results of our shipping have remained unsatis- ^{Shipping.} factory, yet shipowners have continued building and purchasing new ships.

The steam fleet of Bergen consisted, on December 31, of about 200 vessels with an aggregate burthen of 123,420 tons net register. In this number, however, are included eight vessels now in course of construction, with a total tonnage of 8,820 tons.

The number of visitors to the west of Norway was somewhat ^{Tourists.} (1801) C 3

larger than that recorded in 1892, but complaints have been made from different quarters that the season, from a material point of view, was not as good as formerly.

A smaller number of yachts than usual called at this port.

Large quantities of coal and hardware were, as usual, imported from England.

RETURN of Principal Articles of Export from Bergen during the
Years 1892-93.

Articles.			Quantity.	
			1892.	1893.
Herrings, salted	Tons ..	..	32,034	47,025
" kippered	" ..	..	125	211
" fresh.. ..	" ..	..	216	344
Codfish, salted	" ..	..	120	273
Codoil	" ..	..	7,392	7,841
Fish roe.. ..	" ..	..	4,208	4,587
" dried	" ..	..	9,097	10,415
" split	" ..	..	19,094	22,100
" fresh	" ..	..	243	231
Game	" ..	..	221	9
Skins, hides	" ..	..	489	502
Ore	" ..	..	820	10,710
Anchovies	" ..	..	226	482
Lobsters.. ..	Number ..	..	32,239	48,710

RETURN of Principal Articles of Import to Bergen during the
Years 1892-93.

Articles.	Quantity.	
	1892.	1893.
	Tons.	Tons.
Brandy	90	94
Hops	18	20
Hardware	65	61
Coffee	1,041	1,106
Barley	47,789	51,287
Wheat	1,460	565
Maize	812	900
Rye	40,640	63,077
Flour	4,682	7,657
Rice.. ..	556	538
Salt	36,307	46,748
Coal.. ..	150,870	123,031
Sugar	2,852	2,794
Molasses	2,681	2,983
Tea	23	28
Tobacco	246	265
Peas.. ..	1,860	1,202
Wines	397	338

Bodø (Vice-Consul Jentoft).

Trade with Great Britain.	The trade between Great Britain and this place in 1893 shows a falling-off.
Oil and fish.	The export of oil and fish has been destined to the German market.
Sulphur.	Sulphur ore has been sent to Helsingborg in Sweden.
Herrings.	The herring fishery has been good, and the total catch is estimated at 618,000 barrels, but prices have, for the most part, ruled low.
Nickel.	The nickel industry at Beieren has ceased owing to the insufficiency of ore.
Copper.	The export from the copper mines at Sulithjelma was 10,640 tons.

RETURN of all Shipping at the Port of Bodø during the Year 1893.

Nationality.	Sailing.		Steam.		Total.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.
British	1	242	12	12,759	13	13,001
German	1	242	1	631	2	873
Norwegian	9	2,568	7	3,464	16	6,032
Total	11	3,052	20	16,854	31	19,906
„ for the year preceding	2	1,150	14	11,808	16	12,958

TABLE showing Total Value of all Articles Imported to Bodø from Foreign Countries during the Years 1892-93.

Country.	Value.	
	1892.	1893.
	£	£
England	11,200	9,000
Germany	1,700	1,520
Spain	1,600	2,770

RETURN of Principal Articles of Export from Bodö during the
Years 1892-93.

Articles.		1892.		1893.	
		Quantity.	Value.	Quantity.	Value.
Herring	Barrels ..	13,900	£ 10,000	8,500	£ 7,225
Cod-liver oil ..	.. ..	900	1,250	1,520	2,110
Fish.. ..	Kilos. ..	32,390	600	82,800	1,550
Total .. ..	.. ..	..	11,850	..	10,885

NOTE.—Seven ships exported 10,640 tons sulphur ore from Fineidet in Skjarstad; this is not included in the calculation.

RETURN of Principal Articles of Import to Bodö during the
Years 1892-93.

Articles.		1892.		1893.	
		Quantity.	Value.	Quantity.	Value.
Coals	Tons.	15,185	£ 11,200	13,990	£ 8,970
Salt .. ..	.. ..	1,600	1,600	2,770	2,770
Other goods ..	.. ..	..	1,700	..	1,550
Total .. ..	.. ..	..	14,500	..	13,290

Christiansand, S. (Vice-Consul Reinhardt).

The trade of this port during the past year has been dull. Trade. Prices for sawn deals and pit-props have been low, and the exports considerably less than in 1892. While in the export of paper there was an increase, the quantity of wood-pulp shipped was less than in the foregoing year.

Freights have been very bad during the year, and the owners of sailing vessels have suffered considerable losses.

Only one ship has been built here during the year.

The mackerel fishery during a few weeks showed satisfactory results, but the season was very short. The salted mackerel was sent exclusively to the United States. The 547 barrels shipped for Great Britain were sent for transhipment in England to New York and Boston. The salmon fishing was a failure.

The greater number of the private houses burnt in the conflagration of 1892 have been rebuilt. Most of the public buildings now in course of construction will be finished in 1894.

The crops were, on the whole, light. The hay showed excellent quality but lacked quantity. Grain crops were hardly up to a middling average, but the potatoe crop was exceptionally good, and of fine quality. Harvest.

RETURN of British Shipping at the Port of Christiansand in the Year 1893.

Direct Trade in British Vessels from and to Great Britain and British Colonies.

Entered.					Cleared.				
Total Number of Vessels.			Total Tonnage.		Total Number of Vessels.			Total Tonnage.	
With Cargoes.	In Ballast.	Total.	With Cargoes.	In Ballast.	Total.	With Cargoes.	In Ballast.	Total.	Total Value of Cargoes.
129	..	129	117,882	..	117,882	142	..	142	£ ...

TABLE showing Total Export of the most Important Goods from Christiansand during the Year 1893.

Articles.		Total Quantity.	Of which Exported to Great Britain.
Sawn deals—			
Above the length of 19 decimetres..	Cub. metres	27,434	340
Below " " " "	"	1,981	1,283
Pit-props and timber—			
Above the length of 19 decimetres..	"	22,166	17,753
Below " " " "	"	7,455	6,701
Wood-pulp	Tons ..	5,591	4,068
Paper	" ..	1,889	1,601
Beer	Litres ..	5,316	5,273
Nickel	Tons ..	87	87
Salmon (fresh) ..	" ..	78	46
Lobsters	Number ..	250,829	16,170
Mackerel (fresh) ..	" ..	360,161	251,160
" (salted)	Barrels ..	3,078	547
Herrings (fresh) ..	Tons ..	34	14
" (salted)	Barrels ..	624	1

Christiansund, N. (Vice-Consul Parelius).

The trade with Great Britain has, during the past year, shown Trade with a slight improvement. The "Wilson Line" of steamers shipped Great Britain. about 3,000 tons of dried cod-fish, or an increase of 400 tons over the year 1892.

An improvement has also been noticeable in the various General trade. branches of trade, the shipping returns showing an increase of 94,888 tons entered and cleared.

The steamship company "Neptune," in Bremen, mentioned in my report last year, has maintained the trade between Spain, Italy, and this port.

A Norwegian line, subsidised by the Government, has lately New line of been started to facilitate trade between the above-named countries steamers. and this port.

The chief articles of export were dried cod-fish, cod-oils, roe, Export. fish manure, and herrings, showing a total of about 43,000 tons, as against 38,000 tons in 1892.

Salt and coal form the chief import. The former increased Import. 3,200 tons, and the latter to 1,800 tons.

Owing to the great coal strike in England large quantities of Coal. coal have been bought at Bergen.

All the salt imported to this port came from Spain and Italy, Salt. the prices of English salt being to all practical purposes prohibi- tive.

RETURN of Principal Articles of Export from the Port of
Christiansund, N., during the Years 1893-92.

Articles.	1893.		1892.	
	Quantity.	Value.	Quantity.	Value.
	Tons.	£	Tons.	£
Dried codfish	27,000	400,000	22,000	400,000
Cod-oils, roe, fish				
manures	3,000	30,000	2,000	22,000
Herrings	13,000	60,000	14,000	62,000
Total	43,000	490,000	38,000	484,000

RETURN of Principal Articles of Import at the Port of
Christiansund, N., during the Years 1893-92.

Articles.	1893.		1892.	
	Quantity.	Value.	Quantity.	Value.
	Tons.	£	Tons.	£
Colonial products	160	3,000	120	2,500
Salt	27,500	18,000	24,300	16,300
Coals	10,900	8,200	11,100	9,100
Total	40,000	29,200	35,520	27,900

CUSTOM-HOUSE RECEIPTS.

	Amount.	
	1893.	1892.
	£	£
Import duty	12,440	15,680

RETURN of all Shipping at the Port of Christiansund, N., during
the Year 1893.

ENTERED.

Nationality.	Steam.		Sailing.		Total.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.
British	49	44,960	...	...	49	44,960
Norwegian	266	138,490	18	3,440	284	141,930
Other nations	75	34,462	2	648	77	35,110
Total	390	217,912	20	4,088	410	222,000

CLEARED.

Nationality.	Steam.		Sailing.		Total.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.
British ...	49	44,960	...	...	49	44,960
Norwegian ...	233	120,785	23	4,350	256	125,135
Other nations ...	66	25,642	2	648	68	26,290
Total ...	348	191,387	25	4,998	373	196,385

Drammen (Vice-Consul Gram).

To a certain extent there has been a revival in trade in this Trade district.

The export of wood, and more especially the export of planed Timber boards, has again decreased. Prices obtained for floorings have ruled low, but slightly better than last year. Stocks are light and prospects certainly more encouraging.

The export is increasing and prices, especially during the latter part of the year, have been very satisfactory. Wood-pulp.

There has been considerable speculation in wood-pulp for delivery in 1894, and the greater proportion of what is likely to be produced, both of mechanical and chemical pulp, was sold during the summer months.

The large waterfalls at Hønefossen together with the pulp mills, &c., have been bought by an English firm.

Another waterfall near Giethus Station has also been purchased by an Englishman.

Four new mills are in course of construction in this district.

The production is steadily increasing and prices have improved, Paper. but have been unable to keep pace with the rapid upward tendency of the raw material. Prospects are, however, better.

There has been a large import of coal from Great Britain, but, British goods. in machinery, the Germans are competing keenly, no doubt on account of the tariff war between Russia and Germany.

Freights have ruled low, and there is no prospect of any Freights. immediate improvement.

RETURN of British Shipping at the Port of Drammen in the Year 1893.

Direct Trade in British Vessels from and to Great Britain and British Colonies.

Entered.					Cleared.				
Total Number of Vessels.			Total Tonnage.		Total Number of Vessels.			Total Tonnage.	
With Cargoes.	In Ballast.	Total.	With Cargoes.	In Ballast.	With Cargoes.	In Ballast.	Total.	With Cargoes.	In Ballast.
1	3	4	927	2,962	3,889	57	£ ...	19	...
								17,779	...
								271	£ ...

Indirect or Carrying Trade in British Vessels from and to other Countries.

Entered.					Cleared.				
Number of Vessels.			Tonnage.		Number of Vessels.			Tonnage.	
With Cargoes.	In Ballast.	Total.	With Cargoes.	In Ballast.	With Cargoes.	In Ballast.	Total.	With Cargoes.	In Ballast.
Denmark...	...	4	...	4,468	4,468	64	£ ...	...	...
Norway ...	...	11	...	10,473	10,473	157	...	...	...
Sweden ...	...	2	...	1,581	1,581	30	...	...	...
Germany ...	...	4	...	3,522	3,522	44	...	...	...
Holland ...	...	2	...	2,512	2,512	34	...	...	...
Total ...	...	23	...	22,816	22,816	339	...	...	...

Dröbak (Consular-Agent Lehmann).

Shipping has been depressed throughout the year. Shipping.
Ice has formed, as usual, the chief article of export. Export. Owing to
a large demand in England and on the Continent, ice exporters did
a fairly good business.

A biological station is now being constructed here. It is being Biological
built partly by private subscription and partly by a subvention station.
from the Government. It is expected to be finished this year.
The station will be under the administration of the University
authorities. There will be an aquarium attached to it.

RETURN of all Shipping at the Port of Dröbak during the Year 1893.

ENTERED.

Nationality.	Sailing.		Steam.		Total.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.
British	4	860	...	...	4	860
Other nations	187	71,755	46	17,385	233	89,140
Total	191	72,615	46	17,385	237	90,000

CLEARED.

Nationality.	Sailing.		Steam.		Total.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.
British	4	860	...	...	4	860
Other nations	190	72,655	48	17,900	238	90,555
Total	194	73,515	48	17,900	242	91,415

RETURN of Principal Articles of Export from Dröbak during the Year 1893.

Articles.						Quantity.
						Tons.
Timber	..	..	..	..	..	1,170
Ice	..	..	..	..	..	66,700
Hay	..	..	..	..	..	257
Oats	..	..	..	..	..	54

RETURN of Principal Articles of Import to Dröbak during
the Year 1893.

Articles.					Quantity.
					Tons.
Saltpetre	..	..	..	..	320
Sulphuric acid	..	..	..	..	77
Percussion caps	..	..	..	..	1
Wood powder	..	..	..	..	19
Gunpowder	..	..	..	..	37
Coals	..	..	..	..	2,694
Coke	..	..	..	..	90

Egersund (Vice-Consul Puntervold).

Trade.

Trade was depressed, freights low, and nearly all the sailing ships lost money.

Mackerel
fishing.

Although the export of mackerel increased, the catch was only average, and the increase was alone attributable to the greater number of vessels engaged in the fishing.

The export of fresh mackerel and salmon on ice was moderate. Most of the salted mackerel was sent via other Norwegian ports to the United States.

Tourists.

The number of tourists corresponded with foregoing years.

No British
ships.

No British ship entered this port during the year.

RETURN of Principal Articles of Export from Egersund during
the Year 1893.

Articles.					Quantity.	Value.
Mackerel in ice	..	..	Number	..	536,645	£ 4,175
Salmon in ice	..	..	Lbs.	..	20,235	675

RETURN of Principal Articles of Import at Egersund during
the Year 1893.

Articles.					Quantity.	Value.
					Tons.	£
Coal	..	..	..	..	4,929	3,450
Potters' clay	..	..	..	..	1,266	1,900

Farsund (Vice-Consul Sundt).

Trade.

All branches of industry suffered and trade was dull. A decrease both in import and export has been observable.

The aggregate tonnage increased by 1,011 tons. Six ships were purchased, and four lost. The ships, however, worked badly. No British shipping visited the port.

The harvest was unsatisfactory, and below the average. Poor results were obtained.

Agriculture.
Fisheries.

Annex A.—RETURN of Principal Articles of Export from Farsund during the Years 1893–92.

Articles.		1893.		1892.	
		Quantity.	Value.	Quantity.	Value.
Mackerel in ice ..	Lbs. ..	219,000	£ 860	310,000	£ 1,320
Salmon in ice ..	" ..	43,400	1,510	47,000	1,567
Trout in ice ..	" ..	1,620	36	2,750	61
Lobsters, living ..	Pieces ..	46,300	1,800	35,200	1,564
Fish-roe ..	Barrels ..	90	125	436	581
Mackerel, salted ..	" ..	..	..	175	680
Staves ..	Sup. feet ..	..	..	133,000	160
Total ..	..	..	4,881	..	5,933

RETURN of Principal Articles of Import to Farsund during the Years 1893–92.

Articles.	1893.		1892.	
	Quantity.	Value.	Quantity.	Value.
	Tons.	£	Tons.	£
Coals	1,920	1,440	2,112	1,373
Grain	620	6,200	585	7,020
Salt	180	190	220	244
Other articles ..	..	6,350	..	6,600
Total	..	14,180	..	15,237

Annex B.—TABLE showing Total Value of all Articles Exported from and Imported to Farsund from and to Foreign Countries during the Years 1893-92.

Country.	Exports.		Imports.	
	1893.	1892.	1893.	1892.
	£	£	£	£
Great Britain	2,250	3,471	2,310	2,410
Norway	376	410	8,815	9,900
France	125	581	420	400
Germany	990	50	2,525	2,400
Denmark	590	741	..	..
United States of America	..	680	..	..
Other countries	..	..	110	127
Total	4,331	5,933	14,130	15,237

RETURN of all Shipping at the Port of Farsund during the Year 1893.

ENTERED.

Nationality.	Sailing.		Steam.		Total.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.
British	..	..	..	..	..	..
Norwegian	27	7,110	56	39,820	83	46,930
Other countries	..	..	..	..	..	..
Total	27	7,110	56	39,820	83	46,930
„ for the year preceding	..	..	..	..	77	44,117

CLEARED.

Nationality.	Sailing.		Steam.		Total.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.
British	..	..	..	..	..	..
Norwegian	24	5,820	56	39,820	80	45,640
Other countries	..	..	..	..	..	..
Total	24	5,820	56	39,820	80	45,640
„ for the year preceding	..	..	..	..	81	45,815

Flekkefjord (Vice-Consul Eyde).

Trade.
Shipping.

Business was dull, but a slight improvement was noticeable. Shipowners suffered from the continued lowness of the freights, and most of the ships from this district lost money. No British ship touched at this port during the year.

The catch of salmon was a little better than in 1892, being Fisheries: about 40,000 lbs. against 36,000 lbs. the previous year. The greater Salmon. part was shipped in ice to England, partly direct, partly via Farsund and Christiansand, S.

Prices were 10*d.* per lb. for salmon of over 6 lbs. weight, and 6*d.* per lb. for smaller fish.

The mackerel fishing was somewhat better than in 1892. Most Mackerel. of the fish were shipped in ice to England. Prices were, however, low, being 13*s.* 6*d.* per 100 fish against 19*s.* last year.

The lobster catch is estimated at 12,000, or a decrease of 2,000 Lobsters. in 1892. The fishermen got 8*d.* for lobsters measuring at least 8 inches.

The Aaen Sire Salmon Fishery Company hatched 1,750,000 fry Salmon- in 1893, against 2,000,000 in 1892. A State subvention of 225*l.* hatching. was granted to encourage this industry.

The tanning of raw Brazilian ox-hides, the chief industry of Tanneries. the district, gave about the same profit as in former years, namely 7 per cent. to 8 per cent.

The number of hides imported is estimated at 9,500. They were shipped from Buenos Ayres. The greater number found a ready sale in Sweden at the price of about 1*s.* 4*d.* per lb.

This industry showed excellent results. About 100,000 Barrels and barrels were produced. The greater part were used for packing staves. salted herrings and mackerel.

The River Kvina is still leased to an Englishman. The number Sport. of salmon taken last summer was 290.

Annex A.—RETURN of Principal Articles of Export from
Flekkefjord during the Years 1893–92.

Articles.			1893.		1892.	
			Quantity.	Value.	Quantity.	Value.
				£		£
Leather, tanned	..	Tons ..	170	23,375	137	18,500
Mackerel in ice	..	" ..	245	3,350	63	800
Salmon in ice	..	" ..	7	550	6	500
Herrings in ice	..	" ..	..	30	..	..
Other fish in ice	..	Tons ..	4½	75	7	40
Lobsters, live	..	Number..	7,307	270	5,450	250
Herrings, salted	{	Barrels ..	1,498	} 920	..	} 1,260
		Tons ..	..		140	
Game	..	" ..	20	425	2	200
Empty barrels	..	Number..	1,702	140	12,371	900
Hide parings	..	Tons ..	155	850	14	100
Staves	..	Sup. feet	450,000	540	..	..
Other articles	..	..	..	100	..	800
Total	..	..	..	30,675	..	23,350

RETURN of Principal Articles of Import to Flekkefjord during
the Years 1893-92.

Articles.	1893.		1892.	
	Quantity.	Value.	Quantity.	Value.
	Tons.	£	Tons.	£
Raw hides	270	9,000	336	10,600
Cotton and woollen goods	8	2,200	8	2,290
Coals	1,224	980	1,167	1,160
Hardware	5	200	6	240
Salt	440	460	400	64
Oak bark	44	190	212	1,100
Other articles	..	1,600	..	1,000
Total	..	14,630	..	16,454

Annex B.—TABLE showing Total Value of all Articles Exported
from and Imported to Flekkefjord to and from other Countries
during the Years 1893-92.

Country.	Exports.		Imports.	
	1893.	1892.	1893.	1892.
	£	£	£	£
Great Britain	3,555	2,000	2,380	2,300
Brazil	..	..	9,000	10,600
Sweden	24,055	20,000	290	1,800
Germany	7,940	800	1,700	1,290
Spain	..	..	460	64
Other countries	1,125	550	800	400
Total	30,675	23,350	14,630	16,454

RETURN of all Shipping at the Port of Flekkefjord during the
Year 1893.

ENTERED.

Nationality.	Sailing.		Steam.		Total.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.
Norwegian	19	3,623	11	3,813	30	7,436
Swedish	3	315	1	210	4	525
Total	22	3,938	12	4,023	34	7,961
„ for the year preceding	44	6,083	17	8,462	61	14,545

CLEARED.

Nationality.	Sailing.		Steam.		Total.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.
Norwegian	15	3,073	5	1,942	20	5,015
Swedish	2	70	...	...	2	70
Total	17	3,143	5	1,942	22	5,085
„ for the year preceding ...	59	5,302	11	3,942	70	9,244

Fredrikshald (Vice-Consul Gedde).

This year has been very unsatisfactory for sailing ships.

Shipping.

Prices obtained for floorings were a little better than in 1892, but there was a decreased demand for deals (3 inches by 9 inches) and pit-props.

Timber trade.

The pulp mills produced about 10,000 tons. Prices were good.

Wood-pulp.

Halden's Tändstiksfabrik manufactured 6,000 cases of matches.

Matches.

The import of cotton amounted to 300 tons.

Cotton.

The herring fisheries were more satisfactory than in 1892, but little profit was realised.

Herrings.

A few cargoes have been imported from Belgium.

Coal.

The Norwegian marbles from the quarries of Mr. Anker have been much in demand.

Marble.

RETURN of British Shipping at the Port of Fredrikshald in the Year 1893.

Direct Trade in British Vessels from and to Great Britain and British Colonies.

Entered.						Cleared.					
Total Number of Vessels.			Total Tonnage.			Total Number of Vessels.			Total Tonnage.		
With Cargoes.	In Ballast.	Total.	With Cargoes.	In Ballast.	Total.	With Cargoes.	In Ballast.	Total.	With Cargoes.	In Ballast.	Total.
...	...	...	...	...	...	...	...	...	...	...	...
			Total Value of Cargoes.						Total Value of Cargoes.		
			Number of Crews.						Number of Crews.		
			£						£		

Indirect or Carrying Trade in British Vessels from and to other Countries.

Entered.						Cleared.					
Number of Vessels.			Tonnage.			Number of Vessels.			Tonnage.		
With Cargoes.	In Ballast.	Total.	With Cargoes.	In Ballast.	Total.	With Cargoes.	In Ballast.	Total.	With Cargoes.	In Ballast.	Total.
Norway ...	2	2	...	427	427	13	...	13	3,093	...	3,093
Sweden ...	3	3	...	558	558	...	...	...	...	...	...
Denmark ...	5	5	...	1,380	1,380	...	...	...	...	...	...
Germany ...	3	3	...	728	728	...	...	...	...	...	...
Total ...	13	13	...	3,093	3,093	13	...	13	3,093	...	3,093
			Number of Crews.						Number of Crews.		
			Value of Cargoes.						Value of Cargoes.		
			£						£		
			Country to which Departed.								
			England ...								
			Total ...								

Fredrikstad (Vice-Consul This).

This port was visited in 1893 by a larger number of vessels than in the previous years, the tonnage of the 43 vessels that entered being 23,888 tons, as against 13,949 tons, of 36 vessels last year. This increase is mainly due to the herring fishery, as a direct line of small steamers has been established since November between Fredrikstad, Hull, and London to carry the fish to the English markets.

A slight improvement in the price of floorings was noticeable towards the close of the year, but it was not maintained.

The shipments to Australia have been insignificant, the heavy consignments in 1891-92 and a serious financial crisis amongst the building societies, having crippled the demand.

Freights to Melbourne sank as low as 35s., but there has been a slight improvement lately, and ships are now loading at 40s. and 42s. 6d. for Sydney.

The entire export of wood from Fredrikstad to all countries was as follows:—

Articles.						Quantity.
						Cubic metres.
Floorings	..	..	..	..	..	230,651
Sawn wood	..	..	..	..	..	75,056
Round wood	..	..	..	..	..	18,076
Firewood and staves	..	..	..	..	..	34,490
Total						358,273
,, 1892						406,692

The herring fishery showed good results towards the close of year, and large consignments were shipped to England.

The port of Sarpsborg was visited by four steamers and one sailing vessel. The steamers were chartered for the conveyance of wood-pulp from the mills of the Kellner Partington Paper Pulp Company, Limited. The business of this firm seems to increase yearly.

Hammerfest (Acting Vice-Consul Klykken).

Trade.	Last year has been an average one for trade.
Cod fishery.	This industry began in January and lasted almost 5 months. In January and the beginning of February very encouraging results were obtained, but later, owing to prevailing stormy weather, the fishery was greatly interrupted. The autumn fishery has also been good.
Trade with Russia.	Trade with Russia has been bad. The White Sea was blocked till late in the year, and adverse winds detained the Russian traders. Those that did come had but small cargoes, and their credit is bad.
Seal fishery.	The seal fishery was unsatisfactory, and most of the ships lost money. The seal fishery in the White Sea will not be continued.
Prices.	Prices of oil and dried fish maintained a downward tendency, and brought no profit. Goods were cheap, and so no great losses were sustained.

RETURN of Principal Articles of Export from *Hammerfest* during the Years 1893-92.

Articles.	1893.		1892.	
	Quantity.	Value.	Quantity.	Value.
	Tons.	£	Tons.	£
Fish, dried	2,000	40,000	1,400	30,000
„ salted	2,500	16,000	3,700	18,800
Train oil	2,050	40,000	1,100	22,600
Guano, fish	162	1,000	..	..
Other articles	..	6,000	..	7,600
Total	6,712	108,000	6,200	78,800

RETURN of Principal Articles of Import to *Hammerfest* during the Years 1893-92.

Articles.	1893.		1892.	
	Quantity.	Value.	Quantity.	Value.
	Tons.	£	Tons.	£
Coals	12,000	10,000	8,750	6,500
Salt	1,800	1,300	1,820	1,280
Flour	1,200	12,000	990	10,100
Sugar	60	1,300	28	625
Timber	..	600	..	700
Other articles	..	3,500	..	2,800
Total	14,560	28,700	11,558	22,005

RETURN of all Shipping at the Port of Hammerfest during the
Year 1893.

ENTERED.

Nationality.	Sailing.		Steam.		Total.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.
British	1	278	6	4,713	7	4,991
German	...	...	1	495	1	495
Russian	50	3,229	...	...	50	3,229
Norwegian	16	4,182	69	41,690	85	46,872
Total	67	7,689	76	46,898	143	54,587

CLEARED.

Nationality.	Sailing.		Steam.		Total.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.
British	1	278	6	4,713	7	4,991
German	...	...	1	495	1	495
Russian	51	3,274	...	...	51	3,274
Norwegian	18	4,898	78	44,548	96	49,446
Total	70	8,460	85	49,766	155	58,206

Haugesund (Vice-Consul Jacobsen).

The spring herring fishery was very poor, about 75,000 barrels ^{Herring} against 125,000 last year. The prices were very low, the average ^{fisheries.} having been about 5s. per barrel. The result was very unsatisfactory for the exporters.

As usual, our exporters were very much interested in the fat herring fishery in the north of Norway, and many new steamers have been acquired for that purpose in the last years. The catch was considerable, but the prices were low. Nevertheless, the exporters realised good profits by exportation to the Baltic markets.

The winter herring fishery in the east of Norway was smaller than usual, although large quantities of herrings came here. The result of the export was profitable.

The cod fishery on the west coast of Karmö and Bommelö ^{Cod fishing.} Islands increases every year. The catch between Stavanger and Bergen amounts to 3,500,000 against 800,000 in 1892. The coast outside Haugesund is the centre of this fishery. Many fishermen from other parts of this country, even from the north of Norway, have joined in it.

The catch of mackerel was about 25 to 30 per cent. larger than ^{Mackerel} in the preceding year. Results were poor, owing to the bad state ^{fishing.} of the market in America.

RETURN of Principal Articles of Export from Haugesund during
the Years 1892-93.

Articles.		1892.		1893.	
		Quantity.	Value.	Quantity.	Value.
Herrings, salted ..	Tons ..	20,892	£ 63,838	23,571	£ 81,023
" iced and in boracic acid ..	" ..	1,788	3,974	2,118	4,710
Herrings, kippers ..	" ..	476	5,293	687	7,581
Lobsters ..	Number..	10,807	830	17,693	511
Pyrites ..	Tons ..	24,440	33,944	15,427	21,429
Other articles ..	" ..	..	3,886	..	5,905
Total ..	..	..	111,265	..	121,159

RETURN of Principal Articles of Import to Haugesund during the
Years 1892-93.

Articles.		1892.		1893.	
		Quantity.	Value.	Quantity.	Value.
Coals	Tons ..	19,815	£ 12,109	16,887	£ 10,320
Salt	" ..	11,926	13,914	12,877	14,450
Canvas	" ..	10	804	11	911
Metals	" ..	91	10,090	64	7,512
Cotton and linen goods	" ..	14	4,721	13	4,299
Barrel-hoops, willow	Bundles	54,273	1,309	45,400	1,689
Other articles ..	..	..	55,200	..	62,300
Total	..	..	98,647	..	101,481

RETURN of the Trade between Great Britain, &c., and Haugesund
during the Years 1892-93.

Country.	Exports.		Imports.	
	1892.	1893.	1892.	1893.
	£	£	£	£
Great Britain	9,867	13,609	33,634	39,154
Other countries ..	101,898	107,550	60,013	62,327
Total	111,265	121,159	93,647	101,481

RETURN of all Shipping at the Port of Haugesund during the Year 1893.

ENTERED.

Nationality.	Sailing.		Steam.		Total.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.
Norwegian	125	16,479	166	68,106	291	84,585
Swedish	...	...	8	2,012	8	2,012
Danish	...	...	4	144	4	144
Dutch	...	...	4	2,358	4	2,358
German	1	180	...	...	1	180
Total	126	16,659	182	72,620	308	89,279
„ for the year preceding ...	...	...	...	...	...	90,849

CLEARED.

Nationality.	Sailing.		Steam.		Total.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.
British	...	...	3	2,743	3	2,743
Norwegian	151	16,260	159	54,160	310	70,420
Swedish	1	157	11	2,641	12	2,798
Danish	...	...	3	587	3	587
Dutch	...	...	6	3,125	6	3,125
Total	152	16,417	182	63,256	334	79,673
„ for the year preceding ...	...	...	...	...	...	87,963

Kragerö (Vice-Consul Larsen).

Shipowners complain bitterly of the lowness of freights, and Freights. a rise in them at present seems distant.

The prices, during the past year, for ice have been satisfactory. Ice.

The trade has been brisk, and good results are reported.

Wood-pulp.

Exporters of timber have not made money on their shipments. Timber.

Only one failure of any importance was recorded.

Failures.

RETURN of Principal Articles of Export from *Kragerö* during the Years 1892–93.

Articles.	1892.		1893.	
	Quantity.	Value.	Quantity.	Value.
	Tons.	£	Tons.	£
Timber	40,798	75,000	28,603	45,000
Ice	57,302	6,000	61,019	30,000
Wood-pulp	5,434	9,000	5,276	11,000
Apatite	1,618	7,000	1,008	5,000
Feldspar	694	1,000	949	1,500
Total	..	98,000	..	92,500

RETURN of Principal Articles of Import to Kragerö during the
Years 1892-93.

Articles.	1892.		1893.	
	Quantity.	Value.	Quantity.	Value.
Coals	Tons. 5,247	£ 5,000	Tons. 2,344	£ 2,700
Iron	38	50	..	..
Salt	..	..	..	..
Total	..	5,050	..	2,700

RETURN of all Shipping at the Port of Kragerö during the Year
1893.

ENTERED.

Nationality.	Sailing.		Steam.		Total.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.
British	...	...	6	2,918	6	2,918
Other nations ...	404	83,513	83	30,831	487	114,344
Total	404	83,513	89	33,749	493	117,262

CLEARED.

Nationality.	Sailing.		Steam.		Total.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.
British	...	...	6	2,918	6	2,918
Other nations ...	409	84,088	83	30,775	492	114,863
Total	409	84,088	89	33,693	498	117,781

RETURN of British Shipping at the Port of Kragerø in the Year 1893.

Direct Trade in British Vessels from and to Great Britain and British Colonies.

Entered.						Cleared.					
Total Number of Vessels.			Total Tonnage.			Total Number of Vessels.			Total Tonnage.		
With Cargoes.	In Ballast.	Total.	With Cargoes.	In Ballast.	Total.	With Cargoes.	In Ballast.	Total.	With Cargoes.	In Ballast.	Total.
...	...	...	...	...	...	2	...	2	1,030 512	...	1,030 512

Lourvig and Sandefjord (Vice-Consul Dahm).

Trade.

The general trade of these ports has not varied much from the dull state of the previous year. The wood trade, which forms the main feature of the export from here, has undergone no material change, and prices have ruled on the same low level.

The large coal strike in England has spread its bad and deplorable effect also to these ports, and has, in conjunction with the tariff war between Russia and Germany and the Australian crisis, struck a blow from which it will take the trade a long time to recover.

Wood-pulp.

Mechanical wood-pulp has been exported in about the usual quantity, the same mills running. There was a considerable rise in the price of this stuff, varying from 20 to 40 per cent. on the previous year. Now, however, there is every appearance of the price again dropping, principally on account of competition from Canada and the United States, which also have commenced exporting to Great Britain.

Shipping.

These ports were visited by six British ships in 1893, being just the same number as in the year previous.

Freights have ruled perhaps even lower than ever before, and shipowners have, as a rule, lost money.

Steamers are becoming more and more used, and small sailing ships are becoming rapidly fewer. These small vessels are not being replaced by new ones, as the tendency is to produce vessels of larger tonnage, these being cheaper in the working.

To Algoa Bay, Cape of Good Hope, 2 cargoes of timber were sent, these colonies having become large consumers of wood goods lately.

Australia has imported nothing, being overstocked by the large shipments from the former years, which mostly were sent out on consignment.

Imports.

The principal import from Great Britain has also, in 1893, been coals and salt, Germany competing keenly in most articles of machinery.

Herrings.

The herring fishery gave a considerably smaller crop this year than 1892.

RETURN of British Shipping at the Ports of Laurvig and Sandefjord in the Year 1893.
Direct Trade in British Vessels from and to Great Britain and British Colonies.

(1801)

Entered.					Cleared.				
Total Number of Vessels.			Total Tonnage.		Total Number of Vessels.			Total Tonnage.	
With Cargoes.	In Ballast.	Total.	With Cargoes.	In Ballast.	With Cargoes.	In Ballast.	Total.	With Cargoes.	In Ballast.
...	1	1	...	828	828	...	828	...	598
			Total Value of Cargoes.					Total Number of Crews.	
			£ ...					19	
								£ ...	

Indirect or Carrying Trade in British Vessels from and to other Countries.

Entered.					Cleared.				
Number of Vessels.			Tonnage.		Number of Vessels.			Tonnage.	
With Cargoes.	In Ballast.	Total.	With Cargoes.	In Ballast.	With Cargoes.	In Ballast.	Total.	With Cargoes.	In Ballast.
Germany ...	2	...	270	...	1	2	3	2,047	270
Russia ...	1	...	2,047	...	...	...	...	...	...
Denmark ..	...	...	163	...	...	...	...	...	...
Norway ...	...	...	107	...	...	...	...	...	...
Total ...	3	2	2,317	270	1	2	3	2,047	270
			Total ...					2,317	
			Value of Cargoes.					36	
			£ ...					...	

EF

*Lofoten Islands (Acting Vice-Consul Church).*General
remarks

Compared with the year 1892 there was an increase in the cod-fishing industry, but agricultural crops were not satisfactory. The potato crop especially was a failure. On the whole, trade compared unfavourably with that of 1892.

Cod fisheries.

The catches all through the season, from January 15 to April 22, were better than during the corresponding period last year, and resulted in a total of 27,000,000 at the inner Lofotens, and 8,000,000 at the outer islands. This result is considerably over the average.

The fishing at the inner Lofotens since 1881 is shown in the following table:—

Year.	Total Fish.	Salted Fish.	Dried Fish.	Cod Heads for Guano.	Roe.	Medicinal Oil.	Trade Oil.	Value.
	Millions.	Millions.	Millions.	Millions.	Tons.	Tons.	Tons.	£
1881-85 (average)	23 $\frac{1}{2}$	20 $\frac{1}{2}$	3 $\frac{1}{2}$	17 $\frac{1}{2}$	2,340	323	1,650	322,222
1886-90 "	27 $\frac{1}{2}$	23 $\frac{1}{2}$	4	15 $\frac{1}{2}$	2,900	1,310	2,500	345,000
1891	21	18 $\frac{1}{2}$	2 $\frac{1}{2}$	16 $\frac{1}{2}$	1,960	1,820	1,410	371,111
1892	16 $\frac{1}{2}$	12 $\frac{1}{2}$	3 $\frac{1}{2}$	12 $\frac{1}{2}$	1,740	810	1,433	238,888
1893	27	23 $\frac{1}{2}$	3 $\frac{1}{2}$	17 $\frac{1}{2}$	3,110	1,860	1,950	333,333

At the outer Lofoten and Vesteraalen the fishing during the past 3 years has had the following results:—

Year.	Total Fish.	Trade Oil.	Medicinal Oil.	Roe.
	Millions.	Tons.	Tons.	Tons.
1891	3 $\frac{1}{2}$	490	100	290
1892	7 $\frac{1}{2}$	1,040	295	937
1893	8	1,400	462	987

The prices paid for fish ranged from 11s. to 1*l.* 5s. per 100. Livers gave nearly 50 per cent. of oil, prices varying from 7s. to 14s. per hectolitre. The quantity of roe was much larger than in 1892, prices ready salted being from 9s. to 18s. per barrel.

The number of men engaged in the fishery was about 32,000, and the number of boats 7,200. The amount earned per man averaged 12*l.*

Herrings.

Herrings were again this year most plentiful and fat, the quantity fished in the whole of Nordland being about 618,000 barrels, whereas in this district 106,500 barrels. These quantities could have been very considerably increased, but the low prices obtained in this district, namely, 1s. 2*d.* to 2s. 3*d.* per maal of 150 litres (33 gallons), were so unsatisfactory to the net holders, that many abandoned their nets and others abstained altogether from fishing.

These unsatisfactory prices were caused partly by the abund-

ance of fish during the entire season, and partly by the large quantities shipped from Scotland and Holland to the herring markets abroad.

During the autumn and winter a steamer fitted up with presses has been engaged in extracting the oil from herrings, and it is reported that this new venture has proved remunerative.

During the year no single case of foot-and-mouth disease Cattle disease. occurred in this district.

The dredging operations at Kabelvaag, Offersö, and Stamsund Harbour works. have been continued, and it is hoped by these means to make harbours at the above places for boats. A breakwater is in course of construction at Hovden, Vesteraalen, and a channel is being dredged at Risösundet for ships.

RETURN of all Shipping at the Port of Lofoten during the Year 1893.

ENTERED.

Nationality.	Sailing.		Steam.		Total.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.
British ...	...	...	8	4,254	8	4,254
Norwegian ...	4	923	...	...	4	923
Other countries ...	3	498	4	2,568	7	3,066
Total ...	7	1,421	12	6,822	19	8,243

CLEARED.

Nationality.	Sailing.		Steam.		Total.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.
British ...	...	...	8	4,254	8	4,254
Norwegian ...	3	671	10	3,270	13	3,941
Other countries ...	3	498	3	1,908	6	2,406
Total ...	6	1,169	21	9,432	27	10,601

Annex A.—RETURN of Principal Articles of Export from Lofoten during the Years 1892–93.

Articles.	1892.		1893.	
	Quantity.	Value.	Quantity.	Value.
	Tons.	£	Tons.	£
Guano	1,688	8,440	1,621	9,726
Oil	258	3,870	151	2,567
Herrings, salted ..	144	720	44	220
Other articles ..	1	40	..	..
Total	2,091	13,070	1,816	12,513

RETURN of Principal Articles of Import to Lofoten during the Years 1892–93.

Articles.	1892.		1893.	
	Quantity.	Value.	Quantity.	Value.
	Tons.	£	Tons.	£
Coal	7,398	5,548	5,685	4,548
Salt	1,098	1,342	340	357
Other articles ..	..	..	3	266
Total	8,496	6,890	6,028	5,171

Annex B.—TABLE showing Total Value of all Articles Exported from and Imported to Lofoten from and to Foreign Countries during the Years 1892–93.

Country.	Exports.		Imports.	
	1892.	1893.	1892.	1893.
	£	£	£	£
United Kingdom ..	2,610	1,205	5,548	4,548
Germany	10,210	10,968	..	266
Italy	..	..	1,342	..
Other countries ..	250	340	..	357
Total	13,070	12,513	6,890	5,171

Mandal (Vice-Consul Andorsen).

The trade of this district has been very depressed during the Trade whole year, and the prices obtained abroad for timber have ruled low.

(1891)

E 3

The export of boards to Denmark has fallen off to such an extent that the trade is likely to die out.

New industry
Wool-
spinning.

A share-holding company has been formed for the erection of a mill for wool spinning, the motor-power of which will be obtained from a waterfall in the neighbourhood.

Freights.

Freights began and have continued low, and by far the greater number of shipowners have lost money.

Loss of ships
at sea.

There has been an unusually large number of ships lost at sea, but they have been replaced almost in every case by first-class wooden vessels bought abroad.

Fisheries.

The salmon, mackerel, and lobster fisheries have, upon the whole, been up to the average.

The purchase of old fishing-smacks in England has continued, and with good results.

Annex A.—RETURN of Principal Articles of Export from Mandal during the Years 1893–92.

Articles.	1893.		1892.	
	Quantity.	Value.	Quantity.	Value.
	Tons.	£	Tons.	£
Timber	7,448	7,769	9,142	8,766
Birch-staves and fir-staves	4,144	3,725	5,886	5,212
Lobsters	4.5	359	5	468
Salmon in ice	12.5	716	14	764
Oak bark	..	..	9	37
Ice	1,311	170	..	..
Other articles	204	959	238	2,172
Total	13,124	13,698	15,294	17,419

RETURN of Principal Articles of Import to Mandal during the Years 1893–92.

Articles.	1893.		1892.	
	Quantity.	Value.	Quantity.	Value.
	Tons.	£	Tons.	£
Cotton goods	15	1,635	12.5	1,355
Woollen goods	11	3,424	8	2,399
Corn and flour	101.5	706	125.5	1,354
Wine and spirits	3.5	268	8	612
Coals	1,102	826	1,115	781
Other articles	261	4,483	439	6,672
Total	1,494	11,352	1,708	13,173

Annex B.—TABLE showing Total Value of all Articles Exported from and Imported to Mandal from and to Foreign Countries during the Years 1893-92.

Country.	Exports.		Imports.	
	1893.	1892.	1893.	1892.
	£	£	£	£
England	2,515	3,508	3,621	3,819
Denmark, Iceland, and the Faroe Islands ..	7,307	9,125	1,894	4,816
Germany	983	1,021	4,462	3,971
Other countries . .	2,893	3,765	1,375	1,067
Total	13,698	17,419	11,352	13,173

RETURN of British Shipping at the Port of Mandal in the Year 1893.

Direct Trade in British Vessels from and to Great Britain and British Colonies.

Entered.					Cleared.				
Total Number of Vessels.			Total Tonnage.		Total Number of Vessels.			Total Tonnage.	
With Cargo.	In Ballast.	Total.	With Cargo.	In Ballast.	With Cargo.	In Ballast.	Total.	With Cargo.	In Ballast.
...	6	6	...	222	...	...	...	...	...
			Total.					Total.	
			18					...	
			£					£	
			...					...	

Indirect or Carrying Trade in British Vessels from and to other Countries.

Entered.					Cleared.				
Number of Vessels.			Tonnage.		Number of Vessels.			Tonnage.	
With Cargo.	In Ballast.	Total.	With Cargo.	In Ballast.	With Cargo.	In Ballast.	Total.	With Cargo.	In Ballast.
...	...	...	...	...	...	...	...	...	...
			Total.					Total.	
			...					...	
			£					£	
			...					...	

RETURN of all Shipping at the Port of Mandal during the
Year 1893.

ENTERED.

Nationality.	Sailing.		Steam.		Total.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.
British	6	222	...	...	6	222
Norwegian	138	11,362	...	...	138	11,362
Swedish	7	142	...	...	7	142
Danish	...	...	...	...	...	...
Total	151	11,726	...	...	151	11,726
„ for the year preceding ...	181	14,792	...	...	181	14,792

CLEARED.

Nationality.	Sailing.		Steam.		Total.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.
British	...	...	...	...	...	...
Norwegian	149	13,192	3	539	152	13,731
Swedish	9	168	...	...	9	168
Danish	1	111	...	...	1	111
Total	159	13,471	3	539	162	14,010
„ for the year preceding ...	200	14,924	3	777	203	15,701

Molde (Vice-Consul Dahl).

No British merchant-vessel visited this port during 1893. Shipping.
The trade to and from this port is confined to coasting steamers.

Cod-fishing gave middling results.

Fisheries.

Articles.					Quantity.	
Codfish	..	..	..	..	Number ..	766,800
Oil	..	..	..	..	Barrels ..	300
Roe	..	..	..	..	„ ..	800

The profits were small.

The herrings were large, but their quality bad, and the industry suffered. The catch was 5,000 barrels. Herrings.

The corn, potato, and hay harvests were good.

Agriculture.

There was again an increase in the number of travellers.

Tourists.

The public health has been good. No epidemics.

Health.

Annex A.—RETURN of Principal Articles of Export from Molde during the Years 1893-92.

Articles.	1893.		1892.	
	Quantity.	Value.	Quantity.	Value.
	Tons.	£	Tons.	£
Codfish	220	3,600	295	4,735
Guano	640	4,265	250	1,650
Herrings, salted ..	100	675	110	815
Oil	15	200	22	330
Roe	..	..	20	265
Butter	35	3,485	..	..
Total	1,010	12,225	697	7,795

RETURN of Principal Articles of Import to Molde during the Years 1893-92.

Articles.	1893.		1892.	
	Quantity.	Value.	Quantity.	Value.
	Tons.	£	Tons.	£
Coal	570	635	1,050	903
Salt	230	265	..	..
Malt	35	920	..	..
Other articles	200	8,200	327	7,204
Total	1,035	8,010	1,377	8,107

Annex B.—TABLE showing Total Value of all Articles Exported from and Imported to Molde from and to Foreign Countries during the Years 1893-92.

Country.	Exports		Imports	
	1893.	1892.	1893.	1892.
	£	£	£	£
All countries	12,225	7,795	8,010	8,107
Total	12,225	7,795	8,010	8,107

RETURN of all Shipping at the Port of Molde during the Year
1893.

ENTERED.

Nationality.	Sailing.		Steam.		Total.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.
British	...	...	...	...	...	...
Norwegian	2	186	57	37,904	59	38,090
Other countries	...	...	2	763	2	763
Total	2	186	59	38,667	61	38,853

CLEARED.

Nationality.	Sailing.		Steam.		Total.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.
British	...	...	...	...	...	...
Norwegian	1	83	62	40,629	63	40,712
Other countries	...	...	...	...	...	...
Total	1	83	62	40,629	63	40,712

Mosjøen (Vice-Consul Dahl).

No British merchant vessel entered this port during 1893. Trade.

The shipping was entirely confined to coasting steamers.

All articles imported from Great Britain entered viâ Bergen.

The fisheries in this district have not given satisfactory results. Fisheries.

The total weight of salmon taken in the district of Vefsen amounted to 12,000 lbs.

The number of tourists has not appreciably increased this year. Tourists.

Annex A.—RETURN of Principal Articles of Export from Mosjøen
during the Years 1893–92.

Articles.	1893.		1892.	
	Quantity.	Value.	Quantity.	Value.
	Lbs.	£	Lbs.	£
Guano	472,000	1,400	527,800	1,570
Silver ore	436,000	3,200	621,000	4,600
Herrings	..	1,800	..	..
Butter	22,000	1,000	..	..
Total	930,000	7,400	1,148,800	6,170

RETURN of Principal Articles of Import to Mosjoën during
the Years 1893-92.

Articles.	1893.		1892.	
	Quantity.	Value.	Quantity.	Value.
	Lbs.	£	Lbs.	£
Textiles.. ..	330	10	17,000	610
Other manufactured goods.. ..	1,000	90	1,300	125
Wine and spirits ..	1,140	45	3,100	90
Colonial goods ..	..	..	2,800	80
Machinery and hardware	1,230	20	..	..
Other articles ..	5,800	165	5,800	165
Total	9,000	330	30,000	1,070

Annex B.—TABLE showing Total Value of all Articles Exported
from and Imported to Mosjoën to and from Foreign
Countries during the Years 1893-92.

Country.	Exports.		Imports.	
	1893.	1892.	1893.	1892.
	£	£	£	£
Great Britain	1,000	..	..	240
Germany	5,100	6,170	195	330
France	..	..	45	330
Other countries ..	1,300	..	90	120
Total	7,400	6,170	330	1,070

Moss (Vice-Consul Vogt).

Export.

The export consisted, as usual, of ice, wood, and wood-pulp.

Import.

The import is rye, barley, and wheat, principally this year from the Black Sea; and coals, coke, and sulphate from England and Scotland.

IMPORTS.

Articles.			Quantity
	Tons	..	
Rye	..	..	20,490
Barley	..	..	2,308
Wheat	..	..	109
Flour	..	..	2,084
Coal	..	..	17,045
Coke	..	..	348
Salt	..	..	1,359
Sulphate	..	..	877

EXPORTS.

Articles.					Quantity.	
Timber	..	..	..	..	Cubic metres..	10,280
Ice	..	..	..	..	Register tons	14,005
Feldspar	..	..	..	..	Tons ..	280
Wood-pulp*	..	..	..	..	" ..	4,517

* Of which was exported to Great Britain, 1,758 tons; the Continent, 1,653 tons; and America, 1,106 tons.

RETURN of all Shipping at the Port of Moss during the Year
1893.

ENTERED.

Nationality.	Sailing.		Steam.		Total.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.
British ...	1	59	8	9,464	9	9,523
Norwegian ...	74	26,656	73	31,999	147	58,655
Swedish ...	11	286	16	7,116	27	7,382
Danish ...	14	704	41	13,469	55	14,173
Dutch ...	6	547	...	...	6	547
French ...	2	294	...	...	2	294
German ...	...	...	1	201	1	201
Total ...	108	28,526	139	62,249	247	90,775

CLEARED.

Nationality.	Sailing.		Steam.		Total.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.
British ...	1	59	3	4,028	4	4,087
Norwegian ...	58	32,925	76	33,622	134	66,547
Swedish ...	12	292	14	6,758	26	7,050
Danish ...	15	766	38	12,142	53	12,908
Dutch ...	2	136	...	...	2	136
Russian ...	1	151	...	...	1	151
German ...	...	...	1	496	1	496
Total ...	89	34,329	132	57,046	221	91,375

Namsos (Vice-Consul Sommerschild).

During the year trade has not revived.

The prices for timber were low throughout the year. The total amount of timber exported to foreign countries was 8,750 register tons. The greater part, or 7,378 tons, went to British ports, the remainder to Germany. Trade.
Timber.

The import from the United Kingdom included textile goods, coal, hardware, and a few other articles. The greater part of the industrial, as well as of household, articles came chiefly viâ the principal towns in this country. Imports.

Shipping

Only one British merchant ship entered this port during the year, but several yachts and tourist steamers called.

Herring fishery.

The herring fishery failed almost completely.

Agriculture.

The harvest was only average.

Travellers.

A large number of English people visited the district for sporting purposes.

Annex A.—RETURN of Principal Articles of Export from Namsos during the Years 1893–92.

Articles.	1893.		1892.	
	Quantity.	Value.	Quantity.	Value.
	Tons.	£	Tons.	£
Timber	8,750	18,900	10,785	23,000
Herrings	..	..	40	250
Other articles	..	..	5	60
Total	8,750	18,900	10,830	23,310

RETURN of Principal Articles of Import to Namsos during the Years 1893–92.

Articles.	1893.		1892.	
	Quantity.	Value.	Quantity.	Value.
	Tons.	£	Tons.	£
Textiles.. ..	5	1,100	5	1,100
Coffee	8	700	11	1,000
Sugar	26	500	35	800
Flour	23	300	17	230
Coals	2,200	1,800	2,700	2,000
Salt	..	..	200	125
Other articles	18	1,600	25	1,445
Total	2,280	6,000	2,993	6,700

Annex B.—TABLE showing Total Value of all Articles Exported from and Imported to Namsos from and to Foreign Countries during the Years 1893–92.

Country.	Exports.		Imports.	
	1893.	1892.	1893.	1892.
	£	£	£	£
Great Britain	18,000	19,900	2,400	3,000
Germany	900	1,210	2,800	3,100
France	..	700	300	300
Other countries	..	1,500	500	300
Total	18,900	23,310	6,000	6,700

RETURN of all Shipping at the Port of Namsos during the Year 1893.

ENTERED.

Nationality.	Sailing.		Steam.		Total.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.
British	...	...	1	560	1	560
Norwegian	24	5,928	4	1,890	28	7,818
German	1	372	...	...	1	372
Total	25	6,300	5	2,450	30	8,750
„ for the year preceding	33	7,962	6	3,020	39	10,982

CLEARED.

Nationality.	Sailing.		Steam.		Total.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.
British	...	...	1	560	1	560
Norwegian	24	5,928	4	1,890	28	7,818
German	1	372	...	...	1	372
Total	25	6,300	5	2,450	30	8,750
„ for the year preceding	32	7,765	6	3,020	38	10,785

RETURN of British Shipping at the Port of Namsos in the Year 1893.

Direct Trade in British Vessels from and to Great Britain and British Colonies.

Entered.					Cleared.				
Total Number of Vessels.			Total Tonnage.		Total Number of Vessels.			Total Tonnage.	
With Cargo.	In Ballast.	Total.	With Cargo.	In Ballast.	With Cargo.	In Ballast.	Total.	With Cargo.	In Ballast.
1	...	1	580	...	...	1	1	650	650
			Total.					Total.	
			17					17	
			£ 650					£ 650	
			...					...	

Indirect or Carrying Trade in British Vessels from and to other Countries.

Entered.					Cleared.				
Number of Vessels.			Tonnage.		Number of Vessels.			Tonnage.	
With Cargo.	In Ballast.	Total.	With Cargo.	In Ballast.	With Cargo.	In Ballast.	Total.	With Cargo.	In Ballast.
...	...	...	...	...	...	...	...	...	...
			Total.					Total.	
			...					...	
			£ 650					£ 650	
			...					...	

Risør (Vice-Consul Finne).

No ships made money, and freights were low during the whole Shipping-year.

The trade was about as active as in 1892.

Timber.

The export was chiefly to France, and gave good profits.

Wood-pulp.

The ice trade was remunerative, prices being higher than for Ice many years, owing to the small stock in the country. Only a few exporters had their houses filled last year.

RETURN of Principal Articles of Export from *Risør* during the
Years 1893-92.

Articles.		1893.		1892.	
		Quantity.	Value.	Quantity.	Value.
Timber	Tons ..	30,696	£ 31,661	37,056	£ ..
Ice	" ..	5,717	1,917	4,830	..
Wood-pulp, dry ..	" ..	431	3,113	472	..
" wet ..	" ..	120	387	200	..
Lobsters	Number .	5,887	265	..	..
Total	..	..	37,343	..	..

RETURN of Principal Articles of Import to *Risør* during the
Years 1893-92.

Article.	1893.		1892.	
	Quantity.	Value.	Quantity.	Value.
Coals	Tons. 1,482	£ 741	..	£ 650
Total	..	741	..	650

TABLE showing the Total Value of all Articles Exported from and Imported to Risør during the Years 1893-92.

Country.	Exports.		Imports.	
	1893.	1892.	1893.	1892.
	£	£	£	£
England	19,712	..	741	2,510
France	3,525	..	..	..
Belgium	13,710	..	..	..
Denmark	194	..	..	..
Holland	166	..	..	..
Germany	36	..	..	..
Total	37,343	..	741	2,510

RETURN of all Shipping at the Port of Risør during the Year 1893.

ENTERED.

Nationality.	Sailing.		Steam.		Total.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.
Norwegian ...	102	32,872	2	857	104	33,729
Swedish ...	20	262	...	...	20	262
Danish ...	6	549	...	...	6	549
German ...	1	74	1	406	2	482
French ...	2	224	...	...	2	224
Total ...	133	33,981	3	1,266	136	35,246
„ for the year preceding ...	195	48,416	2	72	200	48,488

CLEARED.

Nationality.	Sailing.		Steam.		Total.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.
British ...	...	...	1	1,338	1	1,338
Norwegian ...	126	42,054	20	7,756	146	49,810
Swedish ...	17	208	1	970	18	1,178
Danish ...	7	582	...	...	7	582
German ...	1	74	2	896	3	970
French ...	2	224	...	...	2	224
Total ...	153	43,092	24	10,960	177	54,052
„ for the year preceding ...	197	56,115	12	5,271	209	61,386

*Skien*sfjord (Vice-Consul Franklin).

(The Vice-Consulate of Brevig and Langesund has been merged into that of Skien and Porsgrund. Mr. Franklin is now Vice-Consul for the whole of the fjord of Skien.)

The number of British vessels that entered and cleared in this district during the year 1893 was 21. The tonnage shows a decrease of 2,400 tons. This is mainly due to the fact that the Grimsby ships that carry the ice now sail under the Norwegian flag. British shipping.

Of the 21 ships that cleared 10 were loaded with ice, 4 with copper ore, 2 with timber, and 5 with wood-pulp.

It has been, on the whole, a bad year, although some few ships in particular trades have done fairly well. General shipping interests.

Freights from this district to London and the east coast ports have been above the average, principally owing to the large export of telegraph posts. Freights.

This trade revived slightly in the autumn months, and prospects are brighter. Timber trade.

Only one ship was launched during the year, and the industry has practically come to an end. If some yards for building iron ships could be started here, satisfactory results might be obtained. Ship-building.

There was a steady demand for ice, and trade was active; all the store-houses were emptied. Ice trade

The strikes in England materially affected the import of coal. But there is reason to expect an increasing demand, as several factories are in course of construction. Coal.

A flour-mill of considerable size, and fitted with the best machinery, has been opened in Skien, and is working satisfactorily. New industry.

The Bratsberg Copper Company, of London, has sold its mines, &c., to a Norwegian company. About 1,000 tons (dead weight) was expected as the yield of these mines in 1893. His Majesty King Oscar visited the Ulefoss-Strengen Canal during the autumn. Copper ore.

The tourist traffic through this district has increased very considerably. A commodious hotel, with 80 bedrooms, is now in course of construction at Dalen, at the end of Lake Bandak. Tourists.

It is expected that the line of railway connecting Porsgrund and Brevig will be finished in 1894. This will be a great acquisition, not only to this particular district, but to all ports situated on the south coast, as more direct communication will be opened up with Christiania. Railway communication.

Taken as a whole, the harvest yielded good average results. Agriculture.

Many branches of trade have shown a steady increase, though there has been a somewhat general depression. General trade.

The necessary means have been placed at the disposal of the authorities to keep the navigation from sea to Porsgrund and Skien open all through the winter by the aid of a powerful ice-breaking steamer. Winter access to ports.

The coast is now well provided with lighthouses.

RETURN of Trade in British Ships at the Ports of Skien and
Porsgrund during the Year 1893.

ENTERED.

Direct.			Indirect.			Total.		
Number of Vessels.	Tons.	Crews.	Number of Vessels.	Tons.	Crews.	Number of Vessels.	Tons.	Crews.
9	2,675	76	12	4,329	138	21	7,004	214

CLEARED.

Direct.			Indirect.			Total.		
Number of Vessels.	Tons.	Crews.	Number of Vessels.	Tons.	Crews.	Number of Vessels.	Tons.	Crews.
16	3,913	135	5	3,091	79	21	7,004	214

Stavanger (Vice-Consul Berentsen).

The past year gave most unsatisfactory results to the trade of Trade. this port in general, and must be considered one of the worst that has been experienced for a long time.

Shipping was poor all the year through and closed with Shipping. business almost at a standstill. Many ships have been consequently laid up.

A new firm entitled "Stavanger Mekaniske Værksted" has New iron- been established. The owners propose to construct a new dock works, &c. capable of holding the largest vessel.

At present there are only dry docks in Stavanger.

Four steel ships, three of which were small steam fishing smacks, have been built at the iron shipbuilding yard. The total registered tonnage of these ships amounted to 604 tons, as against about 1,354 tons in 1892.

Marble has been worked at Talgö, and a certain quantity Marble. exported in blocks to Sweden. Most of it, however, is brought to Stavanger to be crushed, and thence exported for the use of mineral water manufacturers. There is some prospect of this industry becoming ultimately remunerative.

The prohibition against exporting sheep from Stavanger was Sheep. removed on October 1. Owing to the lateness of the season only 6,800 sheep were exported from this district to Granton, representing a value, when landed, of 7,000*l*. As far as can be ascertained this was the only consignment of sheep from Norway during 1893.

No authenticated case of foot-and-mouth disease was reported. Some cases of foot-rot occurred amongst sheep imported from Scotland, whilst the animals were at the quarantine station.

The farmers are reckoning upon an increasing demand for live (1801)

stock next autumn, and the Government and local authorities are encouraging in many ways the breeding and fattening of stock suitable for export.

The experiment of exporting fresh meat was tried, but, owing to inexperience and the inability to fatten the animals sufficiently for the English markets, proved unsuccessful.

The Agricultural Society of Stavanger has, however, taken the matter in hand, and sent a man to Scotland to study the fattening of sheep.

The stock-breeding establishment at Rennesö, whose stock is the genuine Cheviot breed (only pedigree animals being imported), sold at a public auction here 53 ewes (average price 15s. 1½d.), and 23 lambs (average price 13s. 8d.).

This society, which is subsidised by the State, has done a great deal towards improving the breed of sheep in this district.

The manager has gone to Scotland on a travelling grant from the Government, in order to investigate all matters connected with sheep farming.

Ponies.
Infusorial
earth.

Only 60 ponies were exported from this port—landed value 70*l*.

A joint stock company has been started to prepare and export infusorial earth, which is found in large beds in a lake near Stavanger. The company has bought the lake, and good results are confidently expected, as the earth is of first rate quality. Contracts have already been made for delivery next year.

Margarine.
Preserved
food, &c.

A new margarine factory has been established here.

This branch of industry has developed considerably, a new firm has been established. The "Stavanger Preserving Company" has retained its reputation.

Mackerel
fishery.

Of late years Stavanger has become a centre of the mackerel fisheries.

The fishing is carried on by trolling at a considerable distance from land, and the fish landed at Stavanger is prepared for shipment to the United States.

Several Swedish boats and one American joined in the fishing last year.

Nets are now being used, and further experiments in this direction will be tried next year.

Herrings.

The fisheries were not good, only a few merchants made any profit. In the case of an inferior spring herring fishery next year some profit may be realised on the stock of herrings caught on the east coast of Norway during the last months of 1893.

Examination
of meat.

According to a new law the examination of meat destined for human consumption by a certified veterinary is now compulsory in towns of upwards of 4,000 inhabitants. This law is now in force at Stavanger.

Shipwreck.

One disaster to British shipping has to be recorded; the wreck of the steamship "Ethelbald" off Aare. All hands were saved, and efforts are being made to refloat the vessel.

New railway.

The town of Stavanger has voted a sum of money towards the continuation of the Stavanger-Egersund Railway to Flekkefjord.

Bank
discount.

The bank discount has been from 5½ per cent. to 6 per cent.

RETURN of Principal Articles of Export from Stavanger during the
Years 1893-92.

Articles.		Quantity.	
		1893.	1892.
Spring herrings, cured.. ..	Tons	795	} 5,440
Fat herrings, cured	"	2,763	
Iceland herrings, cured	"	1,046	
Sprats, cured	"	480	
Spring herrings in ice or boracic acid	"	102½	145
Spring herrings, smoked	"	277	136
Fish oil	"	167	..
Anchovies	"	1,654	1,098
Eels, alive	"	6	..
Mackerel, cured	"	849½	625
" fresh.. ..	"	36	..
Fresh fish in ice	"	59	..
Salted fish	"	10	..
Salmon, fresh	"	80	..
Trout	"	2·3	..
Cod-fish, dried	"	79	64
Artificial manure	"	567	1,913
Potatoes.. ..	"	82	..
Old metal	"	186	63
Fish, game and meat preserved	"	423	351
Seaweed (kelp).. ..	"	1,045	862
Hides	"	53	44
Butter, natural.. ..	"	21	22
" margarine	"	25	14
Rope work	"	40	56
Game	"	2	6
Berries	"	23	..
Manufactures in wool	"	5	..
Wool	"	6	..
Infusorial earth	"	40½	82
Marble crushed and in blocks..	"	1,778	1,322
Cheese	"	3	..
Lobsters.. ..	Number	200,947	116,848
Sheep	"	5,970	2,102
Cattle	"	5	..
Ponies	"	97	3

RETURN of Principal Articles of Import to Stavanger during the
Years 1893-92.

Articles.		Quantity.	
		1893.	1892.
Coal	Tons	86,879½	42,767
Salt .. .. .	.. .. .	11,759	7,196
Rice .. .. .	.. .. .	133	136
Wheat .. .. .	.. .. .	..	..
Maize .. .. .	.. .. .	..	..
Rye .. .. .	.. .. .	1,950	709
Barley .. .. .	.. .. .	3,951	404
Peas .. .. .	.. .. .	46	66
Flour of wheat .. .. .	.. .. .	1,307	1,042
" rye .. .. .	.. .. .	41	184
Coffee .. .. .	.. .. .	390	214
Tea .. .. .	.. .. .	2	2
Sugar .. .. .	.. .. .	202	196
Molasses .. .. .	.. .. .	392	162
Tobacco .. .. .	.. .. .	36	31
Oil .. .. .	.. .. .	856	310
Spirits .. .. .	.. .. .	18	30
Wine .. .. .	.. .. .	32	37
Hops .. .. .	.. .. .	4	4
Cotton .. .. .	.. .. .	2	6
Hemp, flax, jute .. .. .	.. .. .	74	98
Thread .. .. .	.. .. .	9	8
Manufactures—			
Silk .. .. .	.. .. .	1	2
Woollens .. .. .	.. .. .	48	39
Cottons .. .. .	.. .. .	69	74
Hemp, flax, and jute .. .. .	.. .. .	51	57
Leather .. .. .	.. .. .	0 542	0 130
Crockery .. .. .	.. .. .	15	17
Petroleum .. .. .	.. .. .	121	94
Wool .. .. .	.. .. .	48½	53
Hardware .. .. .	.. .. .	18	..

RETURN of all Shipping at the Port of Stavanger during the
Year 1893.

ENTERED—SAILING SHIPS.

Nationality.	Number of Ships.			Tonnage.		
	In Ballast.	With Cargo.	Total.	In Ballast.	With Cargo.	Total.
British	1	..	1	33	..	33
Norwegian	41	117	158	17,467	17,965	35,432
Swedish	..	2	2	..	40	40
Danish	..	1	1	..	147	147
German	2	1	3	192	126	318
Other	..	1	1	..	135	135
Total	44	122	166	17,692	18,473	36,165
" 1892	39	110	149	16,108	14,126	30,234

CLEARED—SAILING SHIPS.

Nationality.	Number of Ships.			Tonnage.		
	In Ballast.	With Cargo.	Total.	In Ballast.	With Cargo.	Total.
Norwegian ...	62	40	102	27,086	3,475	30,511
Swedish ...	...	2	2	...	80	30
Danish ...	...	2	2	...	192	192
Total ...	62	44	106	27,036	3,697	30,733
" 1892 ...	65	40	105	22,196	3,666	25,862

ENTERED—STEAMSHIPS.

Nationality.	Number of Ships.			Tonnage.		
	In Ballast.	With Cargo.	Total.	In Ballast.	With Cargo.	Total.
British ...	...	58	58	...	53,162	53,162
Norwegian ...	51	224	275	15,847	121,967	137,814
Swedish ...	4	45	49	444	11,510	11,954
Danish ...	1	33	34	122	15,081	15,203
Dutch ...	...	29	29	...	16,525	16,525
Russian ...	...	1	1	...	208	208
German ...	...	1	1	...	391	391
Total ...	56	391	447	16,413	218,844	235,257
" 1892 ...	59	368	427	18,776	199,670	218,446

CLEARED—STEAMSHIPS.

Nationality.	Number of Ships.			Tonnage.		
	In Ballast.	With Cargo.	Total.	In Ballast.	With Cargo.	Total.
British ...	2	61	63	2,466	54,241	56,707
Norwegian ...	57	167	224	25,184	86,675	111,859
Swedish ...	5	39	44	1,355	9,276	10,631
Danish ...	2	33	35	791	14,502	15,293
Dutch ...	3	28	31	1,711	15,878	17,589
German ...	...	1	1	...	529	529
Total ...	69	329	398	31,507	181,101	212,608
" 1892 ...	70	296	366	39,974	166,264	206,238

Tönsberg (Consular-Agent Monsen).

Trade has been dull.

Trade.

Freights have been lower than ever, and shipowners are very discouraged. Prospects for the shipping are far from bright.

Freights.

Despite the fact that freights have been low, all the vessels belonging to this port have been sailing during the summer, and but few have been laid up for the winter.

Shipping.

The tonnage of this port has been materially increased by the addition of six steamers loading about 135,000 tons (dead weight), and of four sailing vessels measuring about 4,000 registered tons.

In 1893, 67 vessels arrived here from Great Britain. Of these 41 brought cargoes of coal, 4 salt, 2 with a general cargo, and 20 in ballast.

Import.

The total number of vessels that entered in 1893 was 207.

Export. The number of Norwegian vessels which cleared from this port, bound for Great Britain, was 64. The cargoes consisted, for the most part, of timber, wood-pulp, manure, oil, &c.

The total number of vessels that cleared was 155 sailing ships and 68 steamers, measuring 62,455 tons.

Most of the oil and manure was shipped direct from Finmarken to the United Kingdom.

Sealing. Sealing was carried on by 18 steamers measuring 4,757 registered tons. These caught 104,647 seals, giving about 2,100 tons of blubber. In addition to this 302 bottlenose whales and 55 polar bears were captured.

Two cargoes of seal blubber were sold at Hamburg, the remainder boiled and stocked here.

One steamer was lost off the Island of Jan-Mayen, and four were sent to the Antarctic seas in pursuit of whales and seals.

Seal oil has fetched about 18*l.* per ton. Most of the skins were shipped to London, but only low prices have been obtained.

Whaling. Whaling was carried on by 27 steamers measuring 819 registered tons. They took altogether on the coast of Finmarken 1,102 whales, giving about 3,300 tons of oil. The price fetched by this was 20*l.* per ton, but it has since fallen to 18*l.* per ton. In addition to this, 1,500 tons of guano, realising 5*l.* 10*s.* per ton, and 750 tons of finners, at 100*l.* per ton.

In the Skagerak whale fishing, 8 steamers were employed during the month of December, but it was unproductive, only 5 whales being taken.

Off the coast of Iceland, 13 whaling steamers measuring 436 registered tons, took 495 whales, giving about 2,350 tons of oil.

The bottlenose whaling was carried on by 65 vessels. They took 2,383 whales giving some 2,140 tons of oil, which realised from 21*l.* to 22*l.* per ton.

Herrings. Large quantities of herrings were taken in the Skagerak during December. Prices varied from 4 kroner to 6 kroner (4*s.* 5*d.* to 6*s.* 9*d.*) per measured barrel for fresh herrings. Most of the latter were exported in ice to England.

Salted herrings found a good sale in Germany.

Sailors' wages have been about 2*l.* 10*s.* a month.

Health. The public health has been very good, and we have had no epidemic illnesses during the past year.

RETURN of Principal Articles of Export from Tönsberg during the Years 1893-92.

Articles.	1893.		1892.	
	Quantity.	Value.	Quantity.	Value.
	Tons.	£	Tons.	£
Bottlenose oil	924	18,740	887	14,879
Seal oil	633	11,077	448	7,616
Whale oil	570	10,260	489	8,068
Finners	4	300	..	..
Sealskins	228	9,348	..	..
Pit-props and lumber ..	3,288	5,754	5,287	10,574
Barrels, empty (pieces)	4,808	880	..	..
Guano	163	805	160	800
Herrings	500	611	406	450
Other articles	357	1,220	895	7,055
Total	6,667	58,995	8,572	49,442

RETURN of Principal Articles of Import to Tönsberg during the Years 1893-92.

Articles.	1893.		1892.	
	Quantity.	Value.	Quantity.	Value.
	Tons.	£	Tons.	£
Coal and coke	9,269	4,600	12,541	6,120
Salt	606	404	225	180
Barley	332	2,656	356	3,204
Guano	416	2,080	..	..
Whale oil	539	9,702	..	..
Hemp	186	5,580	165	4,620
Finners	80	2,250	7	1,050
Petroleum	256	1,510	..	..
Other articles	50	220	90	280
Total	11,684	29,002	13,384	15,454

Annex B.—TABLE showing Total Value of all Articles Exported from and Imported to Tönsberg from and to Foreign Countries during the Years 1893-92.

Country.	Exports.		Imports.	
	1893.	1892.	1893.	1892.
	£	£	£	£
Great Britain	58,544	40,582	5,304	6,289
Denmark	1,874	..	2,656	2,748
Russia	2,330	..	5,580	4,620
Sweden	..	1,380	220	280
Germany	1,247	7,480	..	456
America	..	..	1,510	..
Iceland	..	..	18,732	1,050
Total	58,995	49,442	29,002	15,443

RETURN of all Shipping at the Port of Tönsberg during the Year 1893.

ENTERED.

Nationality.	Sailing.		Steam.		Total.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.
British	...	...	...	...	...	...
Norwegian	137	31,367	26	7,280	163	38,667
Swedish	31	788	7	792	38	1,580
Danish	5	318	...	...	5	318
German	1	74	...	...	1	74
Total	174	32,567	33	8,062	207	40,629

CLEARED.

Nationality.	Sailing.		Steam.		Total.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.
British	...	...	...	...	...	...
Norwegian	126	34,581	59	26,737	185	60,318
Swedish	22	687	8	928	30	1,615
Danish	6	410	1	38	7	448
German	1	74	...	...	1	74
Total	155	36,782	68	26,703	223	62,485

Tromsø (Vice-Consul Holst).

Trade.

The trade of this port was smaller than in 1892.

Cod fishery.

The cod fishery both in Lofoten and Finmarken has given poor results, especially during the summer months. Prices, however, have been higher than usual.

The herring fishery yielded good results, but low prices prevailed. Herring fishery.

These gave a bad result, and most of the vessels did not cover their expenses. Seal and walrus fisheries.

The whale fishery at Skorö was satisfactory. The catch was 182 whales by 3 steamers.

A wet cold summer spoilt the corn, but the farmers realised good potato and hay crops. Agriculture.

RETURN of Principal Articles of Import to Tromsö during the
Years 1893-92.

Articles.	1893.		1892.	
	Quantity.	Value.	Quantity.	Value.
	Tons.	£	Tons.	£
Rye flour	492	3,279	707	5,502
Oats and oatmeal ..	102	1,135	12	170
Petroleum	30	217	29	227
Salt	4,222	5,630	1,864	2,485
Coals	30,760	24,607	25,166	20,133
Salted beef	83	668	14	274
Brandy	13	894	15	1,014
Wine	6	50	14	90
Butter	21	1,046	29	1,438
Timber	400	685	955	1,617
Outer bark of birch ..	202	1,181	164	1,363
Other articles	237	9,954	234	11,483
Total	36,518	49,346	29,203	45,796

RETURN of Principal Articles of Export from Tromsö during
the Years 1893-92.

Articles.	1893.		1892.	
	Quantity.	Value.	Quantity.	Value.
	Tons.	£	Tons.	£
Oil	1,990	33,162	1,572	26,203
Stockfish	1,454	28,272	1,496	24,937
Cod, split	160	2,784	61	848
Sei, „	513	6,273	551	5,735
Herrings	805	2,213	930	3,045
Fish, salted	635	3,157	1,247	5,544
Guano	173	959	12	80
Seal and walrus hides..	61	1,346	109	2,419
Eiderdown	..	32	..	237
Other articles	14	394	21	430
Total	5,805	78,592	5,999	69,478

TABLE showing Total Value of all Articles Exported from and Imported to Tromsö from and to Foreign Countries during the Years 1893-92.

Country.	Exports.		Imports.	
	1893.	1892.	1893.	1892.
	£	£	£	£
Great Britain	12,597	6,877	37,021	21,565
Sweden	6,605	8,180	..	..
Germany	35,092	20,856	8,735	11,702
Italy, Spain, and Austria	7,377	15,108	5,125	2,450
Russia	9,639	9,865	7,143	10,023
Holland	6,319	7,656	..	..
Denmark	..	..	1,205	..
Other countries	963	986	112	66
Total	78,592	69,478	49,346	45,796

RETURN of all Shipping at the Port of Tromsö during the Year 1893.

ENTERED.

Nationality.	Sailing.		Steam.		Total.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.
British	1	392	13	10,230	14	10,622
Norwegian	46	6,364	4	2,464	49	8,828
German	..	..	7	4,077	7	4,077
Russian	22	1,637	..	..	22	1,637
Danish	2	322	1	423	3	745
Swedish	1	245	..	..	1	245
Total	71	8,960	25	17,194	96	26,154

CLEARED.

Nationality.	Sailing.		Steam.		Total.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.
British	1	392	13	10,230	14	10,622
Norwegian	46	6,416	70	41,638	116	48,054
German	..	..	7	4,077	7	4,077
Russian	21	1,489	..	..	21	1,489
Danish	2	322	1	423	3	745
Swedish	1	245	..	..	1	245
Total	71	8,864	91	56,366	162	65,232

Trondhjem (Vice-Consul Kjeldsberg).

Trade.

A series of bad harvests, and the poor results in the fishing and timber trade, have greatly affected the trade of Trondhjem, and caused a more or less marked depression in almost all branches.

Export.

In export there has been no noteworthy change from 1892. There has, however, been an increase of about 6,000 tons of ore

2,000 tons of Norwegian and Swedish wood-pulp, of about 600 tons hay, and also a slight increase in cod-liver oil, butter, and paper. The export of salted herrings, copper, and cellulose is somewhat smaller, but the falling-off in the first mentioned has been fully compensated by the larger exportation to Sweden by rail.

The imports have fallen short of 1892, as although a slight **Imports.** increase in grain and flour is observable, yet there is a decrease in salt, coal, and bacon.

The total importation from Great Britain shows a decrease of 10,000 tons, chiefly due to the smaller importation of coal. In spinning materials, yarn, woollen and cotton goods, dyes, iron, iron-plates, clay, and salt there has been a decrease, while linen goods, soda, bricks, lead, and rails show an increase.

British shipping has remained the same as previously.

Shipping.

The effect of the poor harvest of 1893, so far as regards corn, **Harvest.** was to a certain extent modified by an abundant hay crop, which even allowed farmers to export freely.

The trade with Sweden by land has been well maintained, the **Trade with** most noteworthy feature being an increase of 4,000 tons in the **Sweden.** exportation of herrings.

The bank rate of discount was 5 per cent. throughout the year. **Discount rate.**

RETURN of Principal Articles of Export from Trondhjem during
the Years 1893-92.

Articles.	Quantity.	
	1893.	1892.
	Tons	Tons.
Fish, fresh	161	179
„ dried	324	312
Herrings, salted	2,592	2,958
Cod-liver oil	229	174
Timber, Norwegian	10,711	10,000
„ Swedish	26,568	27,938
Ore	28,565	22,026
Copper	191	331
Butter	104	58
Wood-pulp, Norwegian	3,545	2,135
„ Swedish	4,494	3,622
Cellulose	1,944	2,335
Oats	..	3
Fish guano	131	82
Paper	876	511
Beer	2	1
Nickel	65	3
Game	34	40
Hides	120	77
Hay	1,189	531
Reindeer horn	..	25
Spirits	14	49
Caraway	16	19
Metal	54	90
Other articles	48	..
Total	81,977	73,812

RETURN of Principal Articles of Import to Trondhjem during
the Years 1893-92.

Articles.	Quantity.	
	1893.	1892
	Tons.	Tons.
Bacon	427	1,655
Grain	20,595	12,838
Flour	4,312	2,791
Rice	486	482
Coffee	1,372	1,320
Sugar	2,110	1,707
Treacle	2,743	1,898
Wine	110	289
Spinning materials	39	45
Yarn	81	76
Cotton goods	114	124
Woollen goods	92	96
Hides	104	84
Oil	2,102	2,119
Coals	59,125	70,775
Salt	5,901	10,649
Soda	728	206
Iron	2,022	2,479
Rails	1,333	66
Dye stuffs	205	241
Machinery	313	348
Railway carriages	35	18
Wood-pulp	5,631	..
Other articles	3,283	6,466
Total	113,263	116,773

RETURN of Principal Articles of Import from Great Britain to
the Port of Trondhjem during the Years 1893-92.

Articles.	Quantity.	
	1893.	1892.
	Tons.	Tons.
Meat	..	11
Bacon	360	1,228
Cheese	0·2	..
Butter	2	..
Rye	..	313
Barley	2	..
Wheat	..	75
Oats	..	21
Coffee	31	36
Tea	0·5	1
Sugar	326	349
Treacle	2,728	1,842
Oranges	75	86
Raisins	25	8
Bread	..	..
Spirits	14	13
Wine	8	16
Spinning materials	10	30
Yarn	22	35
Silk	0·2	..
Woollen goods	21	27
Cotton goods | .. .. .	77	84
Linen "	54	14
Hides	43	33
Flour	429	98
Suet	0·5	9
Oils	1,063	1,172
Stearine candles	1	1
Soap	10	6
Indiarubber	0·2	2
Wooden goods	6	6
Dyes	64	82
Paper	0·6	3
Clay	127	501
Coals	53,971	69,997
Salt	320	669
Saltpetre	..	..
Soda	710	183
Bricks	492	121
Pottery	6	3
Glass, bottles, &c.	2	6
Iron	964	1,755
Copper	17	18
Zinc	9	13
Lead	91	59
Nails, iron	18	27
Knives and forks (iron) and scissors	2·5	2
Wire, iron	14	18
Tools	22	31
Door handles	2	1
Nails	1,192	46
Anchors and chains	66	68
Iron plates	194	315
Apples and pears	34	39
Vegetables	52	49

(1801)

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RETURN of Principal Articles of Import from Great Britain to the
Port of Trondhjem during the Years 1893-92—continued.

Articles.	Quantity.	
	1893.	1892.
	Tons.	Tons.
Books	1·5	..
Machinery	51	..
Starch	1·3	..
Sailing ship (1 of 338 tons) ..	..	..
Brimstone	941·4	53
Total	69,674·0	79,674

RETURN of Principal Articles of Export from Trondhjem to
Sweden by Rail during the Years 1893-92.

Articles.	Quantity.	
	1893.	1892.
	Tons.	Tons.
Bacon and meat	566	1,238
Herrings and fish, salted	14,760	10,776
Fish, dried	1,671	1,604
Cod-liver oil	39	3
Grain	1,112	1,686
Flour	2,120	1,799
Coffee	370	416
Sugar	76	148
Salt	122	222
Butter and cheese	20	19
Nails	4	17
Metal	11	..
Game	1	2
Coals	122	163
Beicks	..	..
Spirits	13	10
Leather	14	16
Manure	..	126
Potatoes	..	248
Soap	18	16
Brimstone	275	689
Petroleum	182	207
Paper	7	..
Treacle	52	58
Rice	..	15
Flax	17	5
Other articles	134	69
Total	21,706	19,552

RETURN of all Shipping at the Port of Trondhjem during the Year 1893.

ENTERED.

Nationality.	Sailing.		Steam.		Total.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.
British	...	...	74	63,512	74	63,512
Norwegian	15	3,285	219	123,896	234	127,091
Swedish	2	711	5	1,629	7	2,340
Danish	2	230	35	15,665	37	15,815
German	1	265	20	10,302	21	10,567
Russian	1	392	...	...	1	392
Total	21	4,883	353	214,834	374	219,717
„ for the year preceding ...	22	4,845	340	208,122	362	212,967

CLEARED.

Nationality.	Sailing.		Steam.		Total.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.
British	...	...	74	62,882	74	62,882
Norwegian	22	4,485	287	129,758	309	134,243
Swedish	2	572	6	2,542	8	3,114
Danish	2	286	35	15,612	37	15,848
German	1	265	10	5,899	11	6,164
Russian	1	392	...	...	1	392
Total	28	5,950	362	216,693	390	222,643
„ for the year preceding ...	25	4,937	341	209,336	366	214,993

RETURN of British Shipping at the Port of Trondhjem in the Year 1893.

Direct Trade in British Vessels from and to Great Britain and British Colonies.

Entered.					Cleared.				
Total Number of Vessels.			Total Tonnage.		Total Number of Vessels.			Total Tonnage.	
With Cargoes.	In Ballast.	Total.	With Cargoes.	In Ballast.	With Cargoes.	In Ballast.	Total.	With Cargoes.	In Ballast.
14	5	19	8,555	1,139	9,605	284	...	1,762	4,004
									5,798
									146
									£
									...

Vadsö (Vice-Consul Akermund).

The imports during 1893 show a slight increase, with a corresponding decrease in exports. Import and export.

There has again been an increase in the fisheries, and satisfactory results have been obtained. Fisheries.

Since 1881 whale fishing has been prohibited in the Varanger Fjord during the first 5 months of the year, from January 1 to June 1. It is in part owing to this circumstance that better results have been obtained, as this is the period during which the fishermen are busiest.

Fish fetched very fair prices, though oil ruled decidedly low.

The usually brisk trade with the Murman coast has this year been dull owing to the failure of the fisheries in that district. Local trade.

The public health has been good.

Health.

RETURN of Principal Articles of Export from *Vadsö* during the
Years 1893-92.

Articles.	1893.		1892.	
	Quantity.	Value.	Quantity.	Value.
	Tons.	£	Tons.	£
Cod-liver oil	552	4,418	450	4,500
Fish, dried	970	16,125	1,467	24,460
„ salted	2,035	6,945	1,550	5,330
Manure	663	6,630	678	6,788
Reindeer skin	2	150	..	..
„ horn	..	..	..	..
Hides, salted	..	..	..	..
Total	4,222	34,268	4,145	41,078

RETURN of Principal Articles of Import to Vadsö during the
Years 1893-92.

Articles.	1893.		1892.	
	Quantity.	Value.	Quantity.	Value.
	Tons.	£	Tons.	£
Salt	1,195	956	1,048	1,048
Coals	5,800	4,640	4,790	3,725
Orit	46	576	40	600
Rye flour	701	6,000	530	5,677
White flour	7	70	7	140
Salt meat	15	300	14	350
Butter	4	240	4	240
Coffee	..	..	1	100
Sugar	19	733	32	1,250
Tea	1	250	1	220
Wine	1	20	3	180
Spirits	3	330	5	580
Woollen articles	1	600	2	1,100
Rope	9	180	5	100
Iron goods	6	30	7	35
Petroleum	5	90	5	90
Cod-liver oil	100	800	100	800
Fish, dried	29	483	52	712
Timber	2,000	2,000	750	750
Total	9,942	18,298	7,396	17,597

TABLE showing Total Value of all Articles Exported from and
Imported to Vadsö from and to Foreign Countries during the
Years 1893-92.

Country.	Exports.		Imports.	
	1893.	1892.	1893.	1892.
	£	£	£	£
Great Britain	..	..	6,226	5,908
Russia	10,270	5,330	10,469	9,269
Italy	12,800	24,460	..	..
Germany	4,668	4,500	1,603	2,420
Denmark	6,630	6,788	..	..
Total	34,268	41,078	18,298	17,597

RETURN of all Shipping at the Port of Vadsö during the Year 1893.

ENTERED.

Nationality.	Sailing.		Steam.		Total.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.
British	1	233	1	476	2	758
Norwegian	3	1,023	43	24,488	46	25,511
Russian	79	3,727	15	5,318	94	9,045
Danish	5	779	...	...	5	779
German	1	107	...	...	1	107
Total	89	5,919	59	30,281	148	36,200
„ for the year preceding	...	...	...	...	...	37,190

CLEARED.

Nationality.	Sailing.		Steam.		Total.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.
British	1	233	1	476	2	758
Norwegian	3	1,023	43	24,488	46	25,511
Russian	79	3,727	15	5,318	94	9,045
Danish	5	779	...	...	5	779
German	1	107	...	...	1	107
Total	89	5,919	59	30,281	148	36,200
„ for the year preceding	...	...	...	...	...	37,543

Vardö (Vice-Consul Holmboe).

The tonnage of imported goods in 1893 into Vardö was 20,586 **Export and** tons, of a value of 38,710*l.*, as against 17,004 tons, valued at **import.** 31,459*l.* in 1892.

The exports were valued at 67,566*l.* in the year 1893, and at 79,725*l.* in 1892.

The preponderance of exports over imports is explained by the fact that all such articles as tobacco, tea, coffee, wine, brandy, &c., are imported viâ Christiania, Bergen, or Trondhjem.

The whaling business has been about the same as in 1892. **Whaling.** About 1,000 tons of whale-oil were exported from this port.

Both these branches of industry showed excellent results, and **Cod and haddock fisheries.** but for the stormy weather experienced in November and December would have been even better. A regrettable loss of life amongst the fishermen occurred during these stormy periods.

The greater proportion of cod caught in this neighbourhood is salted on board Norwegian vessels and conveyed to the southern towns and drying places. It is then exported as “klip fisk” to Spain, Italy, Brazil, &c.

Captain Joseph Wiggins continued the trade with Siberia, but **Expeditions to Siberia.**

only touched at Vardö to coal and await the three Russian men-of-war that were to accompany him.

The steamship "Orestes" carried a cargo of rails to Siberia and returned thence, bound for Amsterdam, with timber.

The "club" yacht "Blancathra" called at Vardö on her return voyage.

Harvest.

Owing to a cold summer the hay crop was not plentiful in this district, but on the Russian Lapland coast the crops were good, and a sufficient supply can be got from there.

RETURN of Principal Articles of Export from Vardö during
the Years 1893-92.

Countries and Articles.	1893.		1892.	
	Quantity.	Value.	Quantity.	Value.
	Tons.	£	Tons.	£
Great Britain—				
Whale finners ..	9½	380	2½	75
Whale bones.. ..	..	..	92	370
Whale oil	1,000	17,000	1,000	16,700
Guano	92	506	340	1,900
Miscellaneous ..	7½	300	7	300
Italy —				
Stockfish	452	7,530	1,514	21,000
Russia —				
Stockfish	176	3,520	91½	1,740
Fish, salted	4,700	18,600	4,900	20,300
Herrings	256	900	185	630
Miscellaneous ..	15	100	12	70
Germany—				
Cod-liver oil	750	12,650	770	12,800
Guano	1,105	6,080	680	3,800
Total	8,563	67,566	9,594	79,725

RETURN of Principal Articles of Import to Vardö during
the Years 1893-92.

Countries and Articles	1893.		1892.	
	Quantity.	Value.	Quantity.	Value.
	Tons.	£	Tons.	£
Great Britain—				
Salt	1,920	1,700	1,060	1,000
Coal	14,000	11,800	9,463	8,000
Ironware	115	2,800	7	200
Miscellaneous ..	3	200	2	150
Russia—				
Butter	3	180	9	570
Rye flour	1,500	13,500	1,328	11,600
Wheat flour	10½	175	6	100
Oat groats	109½	1,300	43	600
Salted meat	40	800	42	820
Cordage of hemp ..	7½	300	15½	680
Timber, deals, boards, and wood	3,600	2,160	4,000	2,404
Birch bark, outer ..	130	715	121	680
Pork, salted	3½	110	7	220
Cod-liver oil	41	490	52	600
Miscellaneous	20	650	20	650
Germany —				
Sugar	38	1,000	34	900
Tea and coffee	1	100	½	75
Petroleum	23	200	19	160
Cement	11	30	760	1,300
Miscellaneous	10	500	15	750
Total	21,586	38,710	17,004	31,459

TABLE showing Total Value of the Principal Articles Exported
from and Imported to Vardö from and to Foreign Countries
during the Years 1893-92.

Country.	Exports.		Imports.	
	1893.	1892.	1893.	1892.
	£	£	£	£
Great Britain	18,186	19,345	16,500	9,350
Italy	7,530	21,000	..	..
Russia	23,120	22,780	20,380	18,924
Germany	18,730	16,600	1,830	3,185
Total	67,566	79,725	38,710	31,459

RETURN of all Shipping at the Port of Vardö during the Year
1893.

ENTERED.

Nationality	Sailing		Steam.		Total	
	Number of Vessels.	Tons.	Number of Vessels	Tons	Number of Vessels	Tons
British	...	...	3	2,178	3	2,178
Norwegian	11	2,869	6	2,233	16	5,102
Russian	121	11,467	...	...	121	11,467
German	1	265	1	690	2	955
Danish	3	830	...	...	3	830
Swedish	...	...	...	...	...	...
Total	135	15,440	10	5,101	145	20,541

NOTE.—All entered vessels were cleared again.

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REPORT FOR THE YEAR 1893

ON THE

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OBSERVATIONS ON THE "NEW AUSTRALIA
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REFERENCE TO PREVIOUS REPORT, Annual Series No. 1006.

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MAY, 1894.

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1282. Malaga	4d.	1342. Vera Cruz	1d.
1283. Buenos Ayres	8½d.	1343. Saigon	1½d.
1284. Canton	1d.	1344. Stockholm	2d.
1285. Washington	4½d.	1345. Galatz	1½d.
1286. Warsaw	½d.	1346. Trebizond	1d.
1287. Peking	½d.	1347. Algiers	3d.
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1289. Manila	2½d.	1349. Cherbourg	1d.
1290. Bahia	1d.	1350. Jerusalem	1d.
1291. Munich	1d.	1351. Santiago	1d.
1292. Trieste	1½d.	1352. San José	1d.
1293. Tunis	4d.	1353. Trieste	3½d.
1294. Montevideo	1½d.	1354. Madrid	2d.
1295. Belgrade	2d.	1355. Teneriffe	½d.
1296. Teneriffe	1d.	1356. Havana	3d.

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PARAGUAY.

Mr. Pakenham to the Earl of Kimberley.

My Lord, *Buenos Ayres, March 6, 1894.*

I HAVE the honour to inclose an interesting Report drawn up by Mr. Findlay, Second Secretary at this Legation, on the Financial Position of Paraguay, the Paraguay Central Railway and its proposed extension to Encarnacion, and the principal Colonies now springing up.

Remarks are made on the "New Australia Co-operative Settlement" which are well worth studying; the organisation of the undertaking being as yet evidently in an incomplete state, and a large number of the settlers being apparently, with or without reason, dissatisfied with the conditions under which they, with others, undertook to live, but which on experience they declare to be, if not absolutely insufferable, yet inconsistent with the provisions under which they joined the Association while in Queensland.

I have, &c.
(Signed) F. PAKENHAM.

Mr. Findlay to the Hon. F. Pakenham.

Sir, *Buenos Ayres, February 15, 1894.*

I HAVE the honour to enclose a report which I have drawn up on the financial position of Paraguay, the Paraguay Central Railway and its proposed extension to Encarnacion, and the principal Colonies now springing up.

A special interest now attaches to the "New Australian Co-operative Settlement Association," as it is an attempt to found a colony on purely co-operative principles. The colonists have started with everything in their favour—free land, immunity from taxation, a good climate, and a certain command of capital. They are a fine class of men and if they were less disposed to stand on the letter of their rights, and took a more reasonable view of the

failings of their fellows, they would be sure to succeed. As it is they came to found Utopia, and before I visited the colony had succeeded in creating (as they said) "a hell upon earth." It remains to be seen whether those still at the colony will stick together; but if they do not, I think it may be held as conclusively proved that Britons (or Australians at any rate) are born individualists and that they cannot take seriously to Socialism even under the most favourable circumstances. I feel morally certain that if the colony had been started on an individualistic basis (each colonist receiving an allotment), and with no complicated regulations to fight over, not a man would have left the settlement. If they fail it will be owing to the independent character of the men, and the rigid views of their chairman, and not to any want of fertility in the land, or of generosity on the part of the Paraguayan Government.

The experiment should be closely watched, as its result will mean a great deal more than the success or failure of a certain number of Australian emigrants.

The information on the financial position of Paraguay is drawn exclusively from Official sources.

I have given a somewhat lengthy description of the Paraguay Central Railway and its proposed extension to Encarnacion. The information given has not, of course, the value of the report of a specialist, but it is the result of personal observation, and has the advantage of being disinterested. If the extension is carried out, more capital will have to be raised, and therefore a plain and fairly accurate account of the country may have some interest for possible investors, and for those who wish to form some idea of Paraguay.

I have felt it my duty to say some rather hard things of some specimens of British work which have come under my notice; but the amount of British capital which has been wasted in South America justifies plain speaking.

The cause of failure in railway enterprise is usually one of the following:—

1. The large price paid for the concession.
2. The line of country chosen, often with some object quite different from the ultimate success of the enterprise or the development of the country.
3. The scamped work of contractors, which in some cases has necessitated much expenditure on renewal and maintenance of the line.
4. The culpable carelessness with which concessions are taken up in London for the sake of the commission they bring in, without sufficient trouble being taken to secure accurate information about the country to be traversed.
5. The carelessness with which concessions are drawn up and the consequent legal difficulties which eat up profits.

I hasten to add that there are enterprises both in Paraguay and the River Plate which are excellently managed and which compare favourably with any in Europe. This is particularly true

of the great lines which form the main arteries of the Argentine Railway System.

As a rule if investors would get information for themselves, instead of blindly following some financial adviser, they might save much of their money; but this is almost a truism.

There is plenty of room for legitimate enterprise in South America, and if the investing public would look more to the intrinsic paying powers of enterprises to which they are asked to subscribe, and less to the possible prices at which their shares may be quoted on the Stock Exchange, they would think of South America with less bitterness than they do at present.

The present Government of Paraguay are most anxious to attract immigration. The country offers many advantages as a field for colonisation. Land is very cheap and the high premium on gold would enable an English settler to purchase a large extent of land at a small expenditure—say, 100*l.* per square league for good land, in a good district. If colonists of good character were brought out under fair and well understood conditions, by a man prepared to give them good land on reasonable terms, they could hardly fail to succeed; the success of such enterprises depends mainly on the character of those who organize them, and in too many cases the colonist is brought out under conditions which he cannot fulfil, is exploited, and then dismissed as a failure.

The great drawback of Paraguay is its geographical position which renders it dependent on its neighbours for markets for its produce.

The scarcity and uncertainty of these markets is a great obstacle to any rapid progress, and unless the Argentine and Uruguayan markets are assured by treaty or otherwise, or new routes are opened up to Brazil and the Atlantic no sudden return of prosperity can be looked for.

An abstract of the contents of the accompanying report will be found below.

I have, &c.
(Signed) M. DE C. FINDLAY.

Report on the Financial Position of Paraguay, the Paraguay Central Railway and its Proposed Extension to Encarnacion, and the Principal Colonies now springing up.

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Still suffering
from effects
of Paraguayan
War.

Paraguay is only slowly recovering from the effects of the absolute prostration in which it was left by the war with Brazil and the Argentine and Uruguayan Republics, which lasted from 1865 to the death of the Dictator Lopez in 1870. This is said to have swept away nearly half the population and to have left the country denuded of resources.

There was no capital in Paraguay to give, as in France under similar circumstances, a fresh impulse to industry; had there been capital and labour, the natural fertility of the soil would soon have righted matters; but the majority of the young men had fallen in the war, and the old men, women, and children who remained to till the ground were hardly equal to the task. The effects of such a disaster on a race are far-reaching, and render rapid recovery impossible.

I have mentioned these well-known facts because I believe it impossible properly to appreciate the present position of Paraguay unless they are borne in mind.

The last Report on Paraguay by Mr. Arthur Herbert (Diplomatic and Consular Reports on Trade and Finance, 1892, Annual Series No. 1006), gives such a full account of the financial position of the country, and that position has changed so slightly, that it is only necessary for me to give a summary of the last report published by the Ministry of Finance (that for the year 1892).

Finance
Minister's
report, 1892.
Crisis still
continues.

In this Memoria (dated Asuncion, July 3, 1893), Señor Antonio Codes, Minister of Finance, regrets to have to inform Congress that the crisis, which began with the "krach" in the River Plate in 1890, still continues. He is of opinion, however, that the worst is past and that signs of reaction are apparent.

The Government, he says, have always considered the depression

as transitory, and that with time, and the introduction of some economic reforms the financial equilibrium would be restored.

The first step in this direction was the liquidation of the National Bank, ordered by the law of May 18, 1892; and the distrust, caused by the issue of inconvertible notes rendered necessary by circumstances in former years, was somewhat allayed. Nor was this the only effect. The manner of amortisation provided by the same law, and by the law of May 13, did something to check the rise in the gold premium, as the value of the paper currency naturally increased in proportion to the quantity destroyed. Steps taken to improve financial situation.

The gold premium having become steadier simply owing to the influence of commerce, the executive, by the law of June 8, 1892, raised the tariff on imported goods with the object of increasing the revenue so as to meet the expenses of the budget and of the floating debt, both of which had been increased chiefly owing to the depreciation of the currency. The Government continued to watch for an opportunity of steadying still further the quotation of gold and increasing the revenue, and by the law of October 10, 1892, ordered the collection of customs duties in gold, or the equivalent in paper, at the market rate, which was to be approximately fixed by the Ministry of Finance. This measure, says the Minister, had an immediate effect, producing sufficient funds to meet the expenses of the budget. It would also, he says, have gradually appreciated the paper currency but for the imposition by the Argentine Government of a heavy gold duty on Paraguayan tobacco, which ate up the profits on the exportation of that article. Tariff raised. Duties payable in gold or its equivalent.

Señor Cudas further reports that owing to circumstances unforeseen and inevitable, extraordinary expenses had been incurred, which had to be met by the executive, in spite of the precarious state of the Treasury, in order to uphold the national honour. Extraordinary expenses.

Further, the Government never neglected the subject of foreign immigration, nor did it spare the public money in order to show, experimentally, to working men the importance of the country, even in the midst of its economic difficulties, thus rendering it possible to calculate what would be its prosperity if its natural resources were fully developed and its industries exploited. Encouragement of immigration.

The financial position of the administration was considerably out of balance during the first two-thirds of the past year (1892), both owing to the diminution of the revenue and the increase of expenditure; but in the last part of the year the situation had already begun to improve owing to the revival of commerce and the favourable effect of the collection of duties in gold.

The following table shows the general revenue and expenditure for the year 1892, as compared with the preceding year:—

TABLE showing Revenue of Paraguay for the Year 1892,
compared with 1891.

	Currency.			
	1892.		1891.	
	Dol.	c.	Dol.	c.
Customs duties.. .. .	2,131,506	46	1,196,315	20
Sales and revenue from State lands and yerbaes	371,340	47	190,328	10
Various	228,660	23	261,074	19
Total	2,731,507	16	1,647,717	49

NOTE.—Present premium on gold 600 per cent. 1l. = 30 dol.

The comparison of the revenue for 1891-2 shows a difference of 1,083,789 dol. 67 c. in favour of 1892. This difference is chiefly owing to the increase in the revenue derived from the customs duties and the State lands and yerbaes.

(NOTE.—Of course the sales of State lands and yerbaes reduces the assets of the National Government pro tanto, though such sales may be perfectly justified by circumstances.)

The following table shows the expenditure for the year 1892:—

TABLE showing the Expenditure of Paraguay for the
Year 1892.

	Currency.	
	Dol.	c.
Expenditure, as per budget	1,888,868	15
Extraordinary expenditure	411,201	4
Expenditure sanctioned by special laws..	825,846	1
Manufacture of stamped paper, stamps, &c.	53,885	65
Payments made	31,200	7
Amortisation	618,668	29
Total	3,829,569	21

A comparison between the total revenue and expenditure for 1892 shows a deficit of 1,098,062 dol. 5 c., which was covered by an issue of Treasury notes, and part of the credit granted by Government to the National Bank previous to its liquidation. However the floating debt of 1891—amounting to 669,032 dol.—is included in the deficit.

Señor Codas gives the following figures as the value of imports and exports in 1892:—

				Value.	
				Currency.	Sterling.
				Dollars gold.	£
Imports ..	..	..	..	2,190,116 '48	438,023
Exports ..	..	..	..	Dollars paper. 9,296,700 '19	309,890*

* At present premium.

Señor Cudas adds that a large portion of the imports (viz., 533,704 dol. gold) consisted of agricultural implements, machinery and railway material, all of which would have a tendency to improve the agriculture of the country.

At the end of the economic year the floating debt amounted to 403,415 dol., but much of this was paid off after the accounts had been closed.

The "Bonds of the Public Debt" issued according to the law of June 18, 1892, to meet the budget expenses, still amount to 375,900 dol., and are placed in liquidation in the National Bank which would shortly proceed to burn them.

The Committee on "Treasury Bills" has paid off during the past year (1892) bills amounting to 144,376 dol., leaving in circulation 855,624 hard dol., and the balance of 37,800 hard dol. worth of small notes worn out by use.

The liquidation of the National Bank, begun on May 18, 1892, showed the following result at the end of the year.

NATIONAL Bank in Liquidation, 1892.

				Currency.			
				Dol.		c.	
Collected ..	..	..	..	1,045,138	59	Paid ..	..
						In hand ..	..
							..
							1,045,138 59
Credit ..	..	..	..	5,898,220	44	Debit ..	..
Sinking fund to be collected ..	..	..	..	4,430,065	26	Note issue ..	..
External debt—						Internal debt—	
Gold ..	..	..	..	232,772	1	Gold ..	..
Silver ..	..	..	..	225,899	93	Silver ..	..
Argentine paper ..	..	..	..	152,047	62		
Paraguayan paper ..	..	..	..	21	38	Paraguayan paper ..	..
							661,023 27
Notes amortised in the year						Dol.	c.
						381,948	66

These figures show, says Señor Cudas, that the collection of

revenue and expenditure of the Bank have been conducted with satisfactory regularity and that its debit and credit are well balanced; the more so that on the debit side is included the total amount of nationalised bank notes in circulation which are being amortised by means of special funds.

Further, the whole of its external and internal debts which consist of different sorts of money, if reduced to Paraguayan currency at the quotation of the day, would only equal 3,100,000 dol. which does not exceed the credit of the bank, even in this hypothetical case of conversion.

External
debt.

The external debt, resulting from the loans of 1871 and 1872, amounted, at the time of Señor Codas' report, to 4,211,000 dol. (Paraguayan) in addition to the interest for the year 1892.

The arrangement between the Government and the Council of Foreign Bondholders for the payment of the service of this debt was at that time pending the sanction of Congress, as well as the arrangement arrived at with the representatives of the Paraguay Central Railway Company concerning the payment of the interest of the guaranteed capital of that enterprise.*

War
indemnities
due to Brazil
and
Argentina.

The last policies for claims for indemnities due to private persons on account of losses during the war were handed to the Argentine representative during 1892. The Argentine and Brazilian War indemnities and the interest due thereon, amounted to 22,270,123 dol. at the end of that year.

Paraguay
Central
Railway
Company,
Limited.

The principal English enterprise in Paraguay is the Paraguay Central Railway, which was begun in the time of the Dictator Lopez and completed after the war as far as Villa Rica. It has since been extended as far as Pirapó.

Capital.

"The undertaking is" (according to the prospectus), "on the terms stated in the concession, entitled to a guarantee of interest from the Government of Paraguay for 20 years at 6 per cent. per annum upon 2,100,000 dol. gold in respect of the railway from Asuncion to Villa Rica, and 30,000 dol. gold per kilometre of railway from Villa Rica to Encarnacion, about 219 kilometres, equal at exchange of 5 dol. gold to 104,040l. per annum."

The share capital is 482,930l. divided into 21,000 6 per cent. preference shares of 10l. issued as fully paid to the Government as part payment for the portion of the line from Asuncion to Villa Rica, and 27,293 ordinary shares of 10l. each.

TOTAL Capital and Debentures.

					Amount
					£
Share capital	..	..	..	..	482,930
5 per cent. perpetual debenture stock	..				914,000
Total	..	..	..	..	1,396,930

* These schemes were thrown out by the Senate after being passed by the deputies.

The Government complied with its obligations as regards the company up to October, 1890, but since then the guarantee has fallen into arrear. As already stated the arrangement between the Government and the Company's representative as to the payment of the guarantee, was thrown out by the Senate in September of last year. The obligation of the Government was fully recognised, however, and proposals were made for increased taxation (on the export of yerba) to raise the required sum.

According to the terms of the concession the company is bound to extend the line to Villa Encarnacion on the Paraná; it is doubtful, however, whether an extension in that direction would be advisable. Having heard much discussion on this point, I determined to accompany my friend Mr. C. R. Thursby, the Company's representative in Buenos Ayres, on a journey from Asuncion to Encarnacion, and I will give some description further on of the line, and of the country through which we passed.

The following are the traffic returns for the years ending April 30, 1893, and April 30, 1892, respectively:—

			Year ending April 30, 1893.	Year ending April 30, 1892.
			Dollars.	Dollars.
Gross receipts..	..	..	609,191	432,967
Working expenses	..	..	579,400	430,421
Net profit	..	..	29,791	2,546

From these figures it may be seen that there has been some slight improvement, and the manager points out that the profits would be still greater if it had not been necessary to expend so much money on renewal of sleepers and bridges, and in maintenance of the permanent way. Thus we find that 27 bridges "have during the past year been entirely renewed to original dimensions"; that three bridges have been renewed and their dimensions increased, and four more repaired. Several stations have been repaired on the Villa Rica-Pirapó section, that last opened to traffic, and the maintenance of which has lately been taken over by the company from the contractors. On the same section the superintendent reports that most of the sleepers require renewal.

The old sleepers (which have only been laid two years) are completely rotten, being made of soft wood, and a kick suffices to knock a hole in them. That this should be the case in a country where the hardest woods and those best suited for railway sleepers are growing almost on the edge of the embankments, is a scandal, and reflects anything but credit on the builders of the line, or on the engineer who passed it. It is such scamped work as this which discredits British contractors, and I am sorry to say that there are some almost incredible specimens of it to be seen in Paraguay and Misiones. When visiting the ruins of an old Jesuit town at Santa Maria, in Misiones, we found that the lintels of the doors were

Line badly
built.

made of these hard woods. The Jesuits were expelled in 1767 and their settlements were raided soon after by Portuguese slave-hunters, and it is therefore probable that this wood had been exposed to wind and weather for considerably over a century, in spite of which the wood is perfectly sound. The work done by Guayrá Indians for the Jesuits contrasts most favourably with that done by British contractors for British companies.

The falling off in the traffic in tobacco, which has been almost annihilated by the high gold duties imposed by the Argentine Government, has also caused considerable loss to the railway.

Absolute
necessity for
careful and
intelligent
management.

On the other hand it should be remembered that the Government are honestly desirous of doing what they can to meet the guarantee, and that much of the expenditure lately incurred has been rendered necessary by the bad management and misfortunes of former years. There appears to be no reason why the improvement, which has already been begun, should not be continued. To attain this end it is absolutely necessary that the energies of those in charge should be devoted entirely to developing the traffic, with an intelligent knowledge of the requirements of the country. The timber trade may be greatly increased, and agriculture should be much improved and extended. If the various colonies now springing up along the line be carefully encouraged, they will soon have a considerable effect upon the traffic returns.

It is almost incredible that a great portion of the food-supply of Asuncion is imported from the River Plate, yet such is the case. We even found, on our journey from Pirapó to Encarnacion, that maize and flour were brought by cart far into the interior. It would seem that all this could be reversed if the people were encouraged to greater industry by having facilities of transport properly put before them, and by finding it possible to earn more than a bare subsistence.

Description of
line.

To give a better idea of the possibilities of the line, I will now roughly describe the country through which it is now working between Asuncion and Pirapó, and also of our journey over the proposed extension from Pirapó to Villa Encarnacion via Yutí, San Pedro, Cangó, and Carmen.

The line now working is in three sections, viz. :—

				Number of Miles.
Asuncion—Paraguari	..	..	..	45
Paraguari—Villa Rica	..	..	..	47
Villa Rica—Pirapó	..	..	..	62
Total	..	..	..	154

Asuncion to
Paraguari.

The mixed passenger and goods train leaves Asuncion at 6.30 a.m. three days a week and arrives at Villa Rica between 2 and

3 p.m. On the following day a train leaves Villa Rica for Pirapó at 7 a.m. arriving at its destination at about 1 p.m.

For some distance after leaving Asuncion the country on both sides of the line is thickly populated; every few hundred yards there is a thatched cottage, with its wide verandah, surrounded by its patch of maize and mandioca. The soil is sandy, but appears very fertile, and the graceful coco palm grows plentifully on all sides. The fruit of this palm, a hard kernel surrounded by a pulpy substance, is said to be very fattening food for cattle. After the cows have chewed the fruit they deposit the kernels, which are collected by the children, broken and used for making soap and oil, both of good quality. After passing through a long stretch of swampy pasture land, the train stops at several villages, one being of considerable size. The scenery becomes more beautiful, ranges of wooded hills running parallel to the line, and the end of a long valley being closed by several bold bluffs which reminded me much of the "Saxon Switzerland" as seen from the Elbe above Dresden.

Before reaching the village of Tacuarál, the line skirts the large lake of Ipicaraiy, on the other side of which is situated the German Colony of San Bernardino. I visited this colony with Mr. Thursby whom I have mentioned before; a ride of some 10 miles across the swampy land bordering the lake brought us to the colony. It is situated on the slopes of the sierra, and the scenery is beautiful. We saw patches of maize, mandioca, and sugar cane; the soil is very fertile and everything grows luxuriantly, but a long drought (rare in Paraguay), combined with locusts, had caused much damage to the crops, and the colony did not appear to be very flourishing. As far as I could judge, the colonists had found life too easy, and had gradually accommodated their wants to the simple standard of comfort prevalent in Paraguay.

Between Tacuarál and Paraguairí the country is less thickly populated, being mainly open pasture land. Every bit of rising ground is wooded, and in each clump of forest may be seen a few thatched cottages with their patches of cultivation.

After passing Paraguairí the country becomes wilder and more sparsely inhabited. The people are poorer, being outside the immediate "sphere of influence" of Asuncion. Much swampy land is traversed and the wooded knolls and rising ground alone are inhabited. These swamps, however, are by no means useless. The soil in many of them is a rich black loam and they are fairly well stocked with cattle. I believe their productiveness might be immensely increased if a few open drains—such as those in the fen country—were cut through them, and I was told that this had been tried with success. This portion of the line must have been expensive both to build and to maintain, as numerous culverts are necessary and the bridge across the River Tebicuarí-Mini is of considerable dimensions. After crossing this river the land becomes gradually drier and more populated till Villa Rica is reached.

This town has a considerable population and is surrounded by fertile country studded with villages. The people find a market

for their produce and are consequently better off than we found them in the interior of the country.

New
Australia,
progress of,
should be
carefully
watched

About thirty miles from Villa Rica is situated the Settlement of the "Nueva Australia" Co-operative Association. If the leaders of this movement succeed in complying with the terms of the concession (to settle 1,200 families on the land within six years) there will soon be three or four thousand Australians established in the neighbourhood, and this fresh importation of energy and industry can hardly fail to increase the prosperity of the district, and also the traffic on the railway. The movement should be carefully watched by the management of the line.*

Villa Rica—
Pirapó.

"President
Gonzalez"
colony.

The country between Villa Rica and Pirapó is much the same as that already described—low pasture land alternating with forest and the usual Paraguayan ranchos being scattered here and there. At Gonzalez, 15 kiloms. from Pirapó, there is a new Government Colony, which I visited and which I will describe further on. The Railway Company appears to own much land in the neighbourhood but seems to have done little to encourage colonisation. At Pirapó the line abruptly ends in the middle of an open grass plain, almost the only house near the station being a camp store. The only reason for the terminus being situated here was that the contractors have agreed to build 100 kiloms., and that the 100th kilom. was completed at this spot.

From what I saw and heard, it would appear that the carriage and delivery of goods might be still further improved, both as to punctuality and the condition in which goods are delivered. While breakfasting at "Gonzalez" our hostess was informed that about half of a large consignment of flour had been delivered in a damaged state, having been soaked by rain, and the philosophic way in which she ordered it to be "dried in the sun," appeared to prove that she was accustomed to such little accidents.

Pirapó—
San Pedro.

At Pirapó we found horses and a guide whom Mr. White, the Manager of the Railway, had kindly obtained for us. We left Pirapó at about 12 noon and determined to reach San Pedro before night. For the first league or so our road lay through a grass plain bounded by woods, then we pass through a belt of forest with clearings every hundred yards and came to the little hamlet on the banks of the Pirapó. This river is about 25 yards across and runs between high mud banks. It was just fordable when we passed and there had been little rain for three months. We then crossed a wide "estero," or swamp with herds of cattle grazing here and there. The grass seemed to be principally a close growing species of "couch grass," which spreads by putting down suckers from the joints; it is good feed for cattle. There is also a flat reed which they appear to eat freely.

River Pirapó.

On the further side of the estero we reached Yuti situated on the ridge between the Pirapó and Tebicuari Gúazú. The wooded knolls in the neighbourhood seemed to be fairly well populated

* For information respecting this colony, see further on in this report.

and the country presents a pleasing variety of pasture and forest land.

After passing Yutí we descended to the Tebicuari Guazú (big). River Tebicuari Guazú. We found this a large river, perhaps 50 yards across on an average when the water is low. When it is high it floods the whole country round, and we were told that at the ford there was often a lake two miles across after wet weather. As it was, we had to take our luggage across in a canoe and swim the horses, otherwise we should have got very wet. I should think that this river is about five leagues from Pirapó. On the other side we found an Large swamp. immense swamp, but fortunately it was pretty dry, and an hour's ride brought us to rising ground covered with forest in which there were scattered clearings. The soil as a rule consists of red Soil. earth on the rising ground, and this red earth is extremely fertile. The roads through the forests—"picadas" as they are called—are Forest roads. very beautiful. Orange trees grow wild on all sides to a height of from 20 to 30 feet, and the path is strewn with their golden fruit. Flowering creepers hang overhead from the giant lapácho trees, and the maidenhair fern shelters its delicate fronds among the rich green undergrowth. We frequently noticed "schools" or Butterflies. "parliaments" of butterflies of several sorts sitting on the ground, generally in a patch of sunlight near a pool of water. I have seen between 50 and 100 in the space of a few feet, and as they rose the effect was very pretty. I was unable to discover the attraction which brought them together, but I fancy it was something in the soil. We reached San Pedro about 8 p.m. and were hospitably received by Señor Bados who has a store in the plaza.

San Pedro is a small village consisting of a single plaza with San Pedro to Cangó. a long, low, tile-roofed church in the middle. Everybody complained of drought, locusts, the Presidential elections, and the Argentine tobacco duties. The following morning we started at about 4 a.m. for Cangó. As we rode through a grass plain in the early morning we saw a large maned wolf trotting off to the forest. A little further on we came to a herd of about 100 cattle at least, 40 of which were bulls. A general engagement seemed to be impending, and as we passed actually began. The bellowing and fighting soon became general, and the only bulls un-engaged were the fathers of the herd which were too heavy to catch their active little opponents. We noticed this sort of engagement going on several times in the early morning. Much might be done to Number of bulls in herds of cattle. improve the breed of cattle by reducing the number of useless little bulls, which not only fight and harass the heavier animals, but owing to their superior activity become the sires of inferior stock.

I was told that they were left to work their wicked will on the herds, because a bull carries more flesh than a bullock, and yields more "charqui" (dried beef), though the meat is of inferior quality.

It seems a most short-sighted policy to neglect the breed for an immediate gain of a little dried beef. The raising of cattle requires

considerable care in Paraguay and Misiones, as any wound becomes fly-blown unless promptly attended to.

Cangó to
Tácuari.

After about three hours' ride we reached the village of Cangó, almost the fac-simile of San Pedro, though perhaps a little more populous. We called on the brother of our host of the preceding night, and he kindly gave us a good meal. There are no inns in the country, and were it not for the hospitality of the inhabitants (who will always give a night's lodging and food if they have any, gratis) travellers would be hard put to it to find either food or shelter. We started again about 9 a.m., and with the exception of an hour's siesta at a rancho at mid-day we were in the saddle till 8 o'clock. The country passed through was much the same as that already described. We arrived at the scattered village of San Antonio about dark, where the people seemed very poor, and complaints of locusts, drought, and the annihilation of the tobacco trade were general.

Poverty of
people.

Rio Tácuari.

We left at early dawn and soon came to the Tácuari, a deep stream about 50 yards wide, across which we had to swim the horses; the ferryman, a capital fellow, gave us some milk which was most acceptable as we had had practically nothing for 24 hours. A league farther we arrived at the village of Carmen. A single square of tumble-down houses with a church. A more miserable looking place I have never seen, and the people seemed on the verge of famine. From Carmen to San Juan (about five leagues) the country is rolling and stony with very little forest. On the right lies the valley of the Paraná, and every now and then we caught sight of the river. At San Juan we stopped for breakfast, and then rode on three leagues to Villa Encarnacion. On the way we had to pass two rivers, across one of which we had to swim the horses, and the other of which we forded.

Villa
Encarnacion.

Encarnacion is a small town on the Paraná and the principal port of Paraguay on the eastern side. It appeared far from flourishing, and I saw numbers of deserted houses—always a sign of bad times. In fact the Argentine dues on tobacco, and the stringent measures taken against smuggling have entirely paralyzed trade in the eastern part of Paraguay. The distances between the various points where the proposed railway extension would pass are approximately as follows:—

				Number of • Miles.
Pirapó—Yutí—San Pedro	..	..	..	30
San Pedro—Cangó..	..	..	..	9
Cangó—San Antonio	..	..	..	25
San Antonio—Carmen	..	..	..	6
Carmen—San Juan	..	..	..	20
San Juan—Encarnacion	..	..	..	10
Total	..	..	..	90

Pros and cons
of proposed
railway
extension.

The Rivers Pirapó, Tébcuari-Guazú, and Tácuari would necessi-

tate much expenditure on bridges, besides which there are the two considerable streams near Encarnacion. There are several large tracts of swampy land (flooded after rain) over which it would be very costly to carry a line.

On the other hand the country between Pirapó and San Antonio is very fertile and suited either for grazing or cultivation. There is a considerable scattered population, but they produce little more than they consume even in good years, and if a drought or locusts destroy their crop, they sink at once into semi-starvation. As it is, we found that much of the supply of San Pedro, Cangó, and San Antonio, was being brought from Asuncion viâ Pirapó, and thence by bullock-cart.

In view of these facts it appears doubtful whether an extension to Encarnacion could possibly pay, unless, indeed, it was started in connection with an extensive scheme of colonisation. It is a pity to see so much good land unsettled but I doubt whether the present financial position of the Paraguayan Government, or of the Railway Company, would permit them to undertake so costly an enterprise. Otherwise the country between Pirapó and San Antonio appeared admirably suited for colonisation both as regards soil and climate.

One of the objects of extending the Paraguayan Railway to Encarnacion is to place it in connection with the proposed line from Posadas—on the Argentine Bank of the Paraná—to Monte Caseros. This line was begun in 1889, and several sections were built. But the bursting of the boom in the River Plate, and the failure of the contractors, brought its construction to an abrupt close. In riding from Posadas to Concepcion on the Uruguay, we passed earthworks here and there, and at Santo Tomé we saw lines laid, a watertank and an overturned truck, and heard of a locomotive.

I believe there is some talk of proceeding with the construction of this railway, but it is doubtful whether, at present, it would be a success. The country we passed through consisted chiefly of rolling downs. The soil is fertile—a red clay—but the country is practically unpopulated, and will remain so until there is more security for life and property. At present the frequent revolutions in the neighbouring province of Corrientes, and the desultory fighting on the Brazilian bank of the Uruguay have so unsettled the country that it is impossible even for the industrious to prosper.

An efficient force of mounted frontier police, under an honest and energetic commander, would soon put a stop to the cattle and horse stealing which now goes on.

If the country were safe, colonisation might be attracted, and then, and not till then, a railway may be made to pay.

Besides these considerations this route will probably have to compete with two others, which are in a more advanced state of construction, viz.:

Resistencia—Santa Fé—Rosario.
Corrientes—Mercedes—Concordia.

Proposed
route from
Asuncion to
Paranaguá
and Rio de
Janeiro.

Miles.
Rail, 600
Water, 400
Total, 1,000

But no new market would be opened up by these routes, and as already shown the Argentine market may be closed at any moment.

I believe that a proposal has been made to the Board of the Paraguay Central Railway, by Mr. C. R. Thursby, to study another route, viz.: Villa Rica to a point on the Paraná to the north of the Rio Mondá y and opposite the mouth of the Rio Igazú de Curitiba, and that the line should be continued to Paranaguá, or some Brazilian port on the Atlantic. This route, by following the water shed to the north of the Tebicuari, would gain the advantage of avoiding the heavy expenditure on bridge work which the construction of the other line would entail. As far as we could learn the country through which the line would pass has a considerable population both on the Paraguayan and the Brazilian side. Such a line would have the immense advantage of opening the Brazilian market to Paraguayan produce, and bringing Rio Janeiro within nearly the same distance from Asuncion as Buenos Ayres. Little is accurately known of the country in question, but it would seem that it is well worth the while both of the Paraguayan Government and of the Railway Company to consider this proposal before rashly embarking on an extension which may prove unprofitable.

A scheme has already been made by "La Compagnie Française des chemins de fer brésiliens" to construct a railway from Paranaguá on the Atlantic to the mouth of the Igazú de Curitiba.

This line has already been constructed from Paranaguá to the town of Curitiba.

Possible trade
routes from
Asuncion.

The following details respecting the trade routes from Asuncion have been kindly supplied to me by Mr. Thursby, and are clearly illustrated by the accompanying map.

ROUTE A (Proposed by Mons. Cahen d'Anvers).

Description.	Number of Miles.
River Uruguay—	
Buenos Ayres to Concordia	202
East Argentine Railway—	
Concordia to Monte Caseros (constructed)	99
Argentine North-Eastern Railway—	
Monte Caseros to Posadas (unconstructed)	280
Crossing Paraná River	1
Paraguay Central Railway—	
Eucarnacion to Yuti (unconstructed)	74
Yuti to Asuncion (constructed)	154
Total	899

PLAN
OF VARIOUS ROUTES
BETWEEN
BUENOS AIRES AND ASUNCION
SHOWING ALTERNATIVE ROUTES
TO
RIO DE JANEIRO.

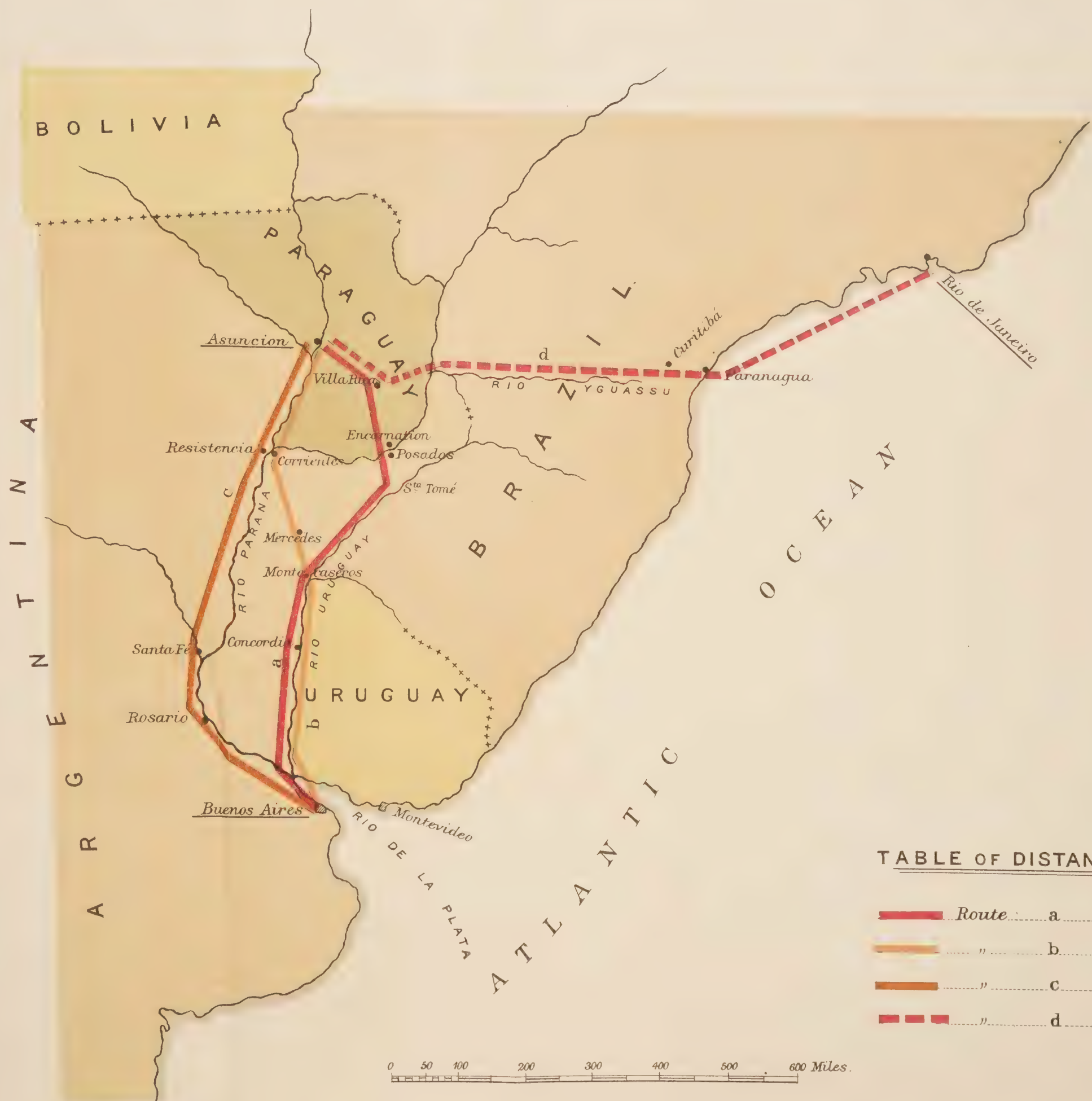


TABLE OF DISTANCES.

Route	Miles.
a	899
b	906
c	903
d	1000

0 50 100 200 300 400 500 600 Miles.

PARAGUAY.

17

SUMMARY.

Description.	Number of Miles.
River	303
Constructed railway	253
Unconstructed railway	343
Total	899

ROUTE B (viâ Corrientes).

Description.	Number of Miles.
River Uruguay—	
Buenos Ayres to Concordia	302
East Argentine Railway—	
Concordia to Monte Caseros (constructed)	99
Argentine North-Eastern Railway—	
Monte Caseros to Mercedes (constructed)	87
Mercedes to Saladas (unconstructed) say	60
River Paraguay—	
Corrientes to Asuncion	283
Total	906

SUMMARY.

Description.	Number of Miles.
River	585
Railway (constructed)	246
„ (unconstructed)	75
Total	906

ROUTE C (viâ Resistencia and Rosario may also be completed).

Description.	Number of Miles.
Buenos Ayres and Rosario Railway—	
Buenos Ayres to Santa Fé (constructed)	299
Provincial Railway of Santa Fé—	
Santa Fé to Reconquista (constructed).. .. .	197
Reconquista to Resistencia (unconstructed) say	124
River Paraná—	
Resistencia to Asuncion	283
Total	903

SUMMARY.

Description.						Number of Miles.
River	..	..	..	..	..	283
Railway (unconstructed)	..	..	..	..	..	124
" (constructed)	..	..	..	..	..	496
Total	..	..	..	..	..	903

Besides these three routes there is the river route viâ the Rivers Paraguay and Paraná which, if properly taken advantage of, would compete with the railway both in the passenger and goods traffic with every chance of success.

The distance from Asuncion to Rio Janeiro viâ Paranagua by the route it is proposed to study is as follows:—

ROUTE D.

Description.						Number of Miles.
Paraguay Central Railway—						
Asuncion to Villa Rica (constructed)	..	..	..	..	..	102
Proposed extension to mouth of the Curitiba	..	..	..	..	} say	500
Mouth of the Curitiba to town of same name and thence by constructed railway to Paranagua..	..	..	..	..		
Paranagua to Rio Janeiro by sea	..	..	..	..	..	400
Total	..	..	..	..	..	1,002

According to Mr. Herbert's report above mentioned, a concession has been granted by the Paraguayan Government to M. Obert de Thienis for a railway from Asuncion to Villa Igatimi with a branch to Tacurupucu on the Upper Paraná. The Government were to guarantee 6 per cent. on this line which was to be part of a trans-continental railway to the Atlantic. I am unable to say whether this concession is still in force, or whether any steps have been taken to survey the proposed line, but as far as I can ascertain nothing has been done on the Paraguayan section.

While at Asuncion in December last, I had interviews with both President Gonzalez and Dr. Venanzio V. Lopez, Minister for Foreign Affairs. The conversation turned chiefly on the "New Australia" Co-operative Settlement, from which 85 men, women, and children had just seceded, owing to disputes among the members. I was much impressed by the anxiety shown both by President Gonzalez and by Dr. Lopez (who is also charged with the Colonisation Department) to encourage the immigration of a good class of colonist as the best means of repopulating and regenerating the country and galvanising into life its agriculture and industries.

Both the President and Dr. Lopez professed themselves most anxious to attract good British emigrants, in preference to those of other nationalities, and the generous manner in which the Government has behaved towards the Australian colonists conclusively proves that they practice what they preach.

Paraguayan Government anxious to encourage British immigration.

Dr. Lopez summed up the advantages of Paraguay as a field for British emigration as follows:—

1. A good and healthy climate and a fertile soil.
2. A population which is friendly to foreigners.
3. The Central form of Government (as opposed to the Provincial) which renders it more easy to obtain redress in case of injustice.

Advantages of Paraguay.

All this is true. The climate is by no means tropical, *e.g.*, we several times rode all day exposed to the sun without any ill-effects, and December and January when we were there are two of the hot months. The soil is extraordinarily fertile and we found the people uniformly hospitable and friendly.

The great drawback to Paraguay is the lack of an assured market for its produce.

Drawbacks.

It depends chiefly upon the Argentine and Uruguayan markets to dispose of its tobacco, and these may at any moment be closed against it. There is, however, a considerable home demand for food stuffs, and it will be some time before the supply meets it.

To show how much the Government has already done for colonisation, I will now give what information I have been able to collect on the subject of the "New Australia" and "President Gonzalez" colonies, both of which I visited at the request of Dr. Lopez.

NEW AUSTRALIA.

The movement which has resulted in "The New Australia Co-operative Association" began about two years ago, and originated, as I was informed, in dissatisfaction with the conditions of labour and the land legislation now in force in the Australian colonies. The great Australian labour strikes in which the trade unionists were beaten brought it many recruits, and it was determined to found a community on co-operative principles, with the object of "putting into practice, upon a voluntary basis, and under the most favourable conditions available, that form of industrial association which will secure justice for all."

New Australia.

Origin of movement.

The basis of the association is as follows:—

Object.

Basis of Co-operative Organisation.

Ownership by the community of all the means of production in exchange and distribution.

Production.

Conduct by the community of all production in exchange and distribution.

- Superintendence by the community of all labour-saving co-operations.
- Allotment.** Maintenance by the community of children under guardianship of parents.
Maintenance by the community of all sanitary and educational establishments.
Saving by the community of all capital needed by the community.
Division of remaining wealth production among all adult members of the community equally, without regard to sex, age, office, or physical or mental capacity.
- Authority.** Subject to the supremacy of the laws of the state settled in, which all members pledge themselves to observe loyally, the following authority and regulations shall be observed between the members of the community:—
Ballot vote of all adult members to be supreme authority.
Director, elected by two-thirds majority of general ballot, to be sole executive authority, advised by Board of Superintendents.
Superintendents, elected by two-thirds majority of departmental ballot, to be sole departmental authorities, subject to director.
- Regulations.** Regulations affecting the community at large to be confirmed by a two-thirds majority of all adult members.
Departmental regulations to be confirmed by a majority of all adult members interested.
All regulations to be submitted annually for continuation or rejection.
Disputes arising between the community and any member or members to be decided in equity by an arbitrator mutually agreed upon between the communal authority and the member or members interested.
Disputes arising between members to be decided in equity by an arbitrator mutually agreed upon by them.
Dismissal from the community, for persistent or unpardonable offence against the well-being of the community, to be decreed only by a five-sixth majority of all adult members.
- Elections.** All offices to be vacated annually and whenever occupants cease to retain the confidence of their constituents.
- Individuality.** The individuality of every member in thought, religion, speech and leisure, and in all matters whatsoever whereby the individuality of others is not affected to be held inviolable.
- Sex equality.** The sexes to be recognised as equally entitled to full membership.
- Religion.** Religion not to be officially recognised by the community.
- Amendment.** Amendment of this basis for co-operative organisation to be made only by a two-thirds majority of all adult members.

The following are the principal financial clauses from the articles of association:—

Financial Clauses.

Every member of the association, by act of joining the association, agrees to subscribe to the funds of the association all he may possess when he is finally enrolled for actual migration, such subscription to be not less than 60%. Agreement.

The necessary funds for all preliminary expenses, including prospecting, organisation, and colonisation arrangements, shall be provided by a preliminary payment of 10%, 5% of which must be paid within one month of provisional enrolment, the other 5% within three months of provisional enrolment: this 10% to be counted as part of the 60% which is fixed as the minimum final subscription. Preliminary expenses.

The payment of 10% for preliminary expenses and the final subscription of not less than an additional 50% shall both be, when made, free and voluntary donations to the board of trustees for the purposes of the association, which no member shall reclaim if he decides, after having made either, to withdraw from membership. But any member shall be entitled to reclaim any amount over 10% which he may have paid to the board of trustees in advance for and on account of his final subscription should he decide, before final enrolment for migration, to withdraw from membership. The board of trustees, if for any reason whatever it decides to strike from the roll any member who has fulfilled to the time of such striking off all the conditions of membership, shall return him his previous payments in full. Return of payments.

A subscription of 30% will be required for widowed mothers accompanying sons to the settlement. Exceptions at discretion of trustees. Widowed mothers.

At the discretion of the trustees a minimum subscription of 100% may be required of men over 50 years of age applying for membership. Men over fifty.

Every member on joining shall state the estimated amount of his intended final contribution, and the delegate enrolling shall certify that such is a fair estimate to the best of his knowledge and belief. Estimated final contribution.

Every family enrolled after June 12, 1893, to be charged a premium of 10% for every child over one year of age, this premium to be added to the final payment of not less than 50%. Exceptions at discretion of Trustees. Premium for children.

W. W. HEAD,
Secretary Board of Trustees.

111 Elizabeth-st., Sydney, June 12, 1893.

The following clause respecting liquor has given rise to the first secession from the colony:—

“Without prejudice to the liquor question members shall pledge themselves to teetotalism until the initial difficulties of settlement have passed, and the constitution been established.”

The association, having been thus formed, rapidly gained

strength, Messrs. McNaught and Head being the prime movers. At first land was sought in Australia, but the conditions under which it was offered were not satisfactory to the leaders of the movement, and agents were sent to prospect for a suitable concession in South America. These agents, Messrs. Walker and Saunders, visited Brazil and the Argentine Republic, and finally settled on Paraguay. The Paraguayan Government did everything it could to meet their wishes, and finally a concession was signed, according to which the Government agreed to concede to the association free of all charge 100 leagues of land specified in the department of Caagüazú, near Villa Rica, on condition that the association should form a pastoral and agricultural colony, and should introduce into the country within the next six years 1,200 families, amounting in all to between four and six thousand souls. The title-deeds of 50 leagues to be delivered within six months counting from March 15, 1893, and those of another 50 leagues adjacent thereto, as soon as the association has introduced 600 families.

The association is now registered in Paraguay as a limited liability land company with a capital of 20,000*l.* in 10*l.* shares.

Expenditure
on colony by
Paraguayan
Government.

In order to comply with the terms of the concession the Government had to buy much of the land, which was in the hands of private owners. Congress voted, with this object, 200,000 *dol.*, and as this sum was not sufficient the Government sold State *verbales* to the amount of about 250,000 *dol.* The expenditure of so large a sum shows how anxious they are to secure the success of the colony.

Arrival of
colonists,
September 22,
1893.

A home having been thus provided, a large sailing ship—"The Royal Tar"—was purchased on behalf of the association and the pioneers left Sydney on July 16 and arrived at Asuncion on September 22, 1893. On disembarking they numbered 252 souls. They at once proceeded to Villa Rica, and as soon as a site had been chosen for the new settlement, they went to work to clear the forest, construct temporary houses, and to plant such crops as could be sown at that time of year.

Visit to the
colony,
December 31,
1893.

I visited the colony on December 31 (13 weeks after their arrival) and found them living in well thatched huts, which answered all the purposes of shelter. These huts were regularly built, and are to be relegated to the position of outhouses at the back of the future kitchen gardens, at the other end of which comfortable cottages of brick and mortar are to face the main street. The work is organised in departments, and the members of each department elect their own foreman.

The bachelors lived together in a long low hut, and messed together, and the married people had their meals in their own huts.

The cooking was by no means bad. Beef-steak and onions seemed the predominating dish in the bill of fare, the bread is excellent and milk plentiful. The drink consisted of *maté*—Paraguayan tea—made in a tea-pot. It is very refreshing and by no means disagreeable, though, I confess, after nine hours in the

saddle under a broiling sun our unregenerate souls longed for something stronger. I have said sufficient to show that if the colonists are not exactly living in luxury, they are certainly not enduring any hardship. When the new houses are ready various pianos and 250*l.* worth of band instruments, which astonished the inhabitants of Villa Rica, are to be brought up to the settlement, so that the sturdy pioneer will be able to solace himself with the charms of music.

The settlement is situated on some rising ground and looks over a long stretch of pasture land bounded by forest and dotted by clumps of trees. There is something very English in the landscape, and this is true of other parts of Paraguay. It appeared to my companion and myself that the Government had treated the association very well, not only as regards the quantity, but as regards the quality of the land conceded. The association has secured 100 leagues (they have already received the titles for 67 leagues) of what I believe to be the best land in Paraguay. It is well-watered and well-wooded, and in Paraguay wherever there is forest the soil is very fertile, and will grow almost anything.

Extent of
land
conceded.

The pasture land is also excellent, and I was informed, on good authority, that the district now occupied by the association was requisitioned by the Dictator Lopez, during the Paraguayan war, for 50,000 head of cattle—and met the demand.

At the time of the arrival of the pioneers there were about 300 Paraguayan families, chiefly squatters, on the land belonging to the association. In recognition of the generosity of the Government, the association has, I understand, agreed to give back three leagues of the land conceded, and the native families are to be gradually moved on to this.

Native
families.

At present the relations of the colonists with the natives appear to be excellent.

I was much struck with the appearance of the pioneers. In every way they are a fine set of men and women, and of a stamp much superior to that of any emigrants yet seen in South America. They appeared to me steady, respectable people, but very independent in character—men whom it would be hard to lead and impossible to drive.

Appearance
of pioneers.

I had been instructed to visit the colony to enquire into the causes of the expulsion of three members, and the secession of about one-third of the colony.

Secession of
85 souls.

The dispute had begun in personal differences, aggravated by the intrigues of two or three men. An agreement had been signed binding the colonists to total abstinence till preliminary difficulties had been overcome, which period had been fixed, I believe, at three years.

This agreement was broken by the three men expelled, the ladies joined in the quarrel, strong language was used, threats exchanged and 85 men, women, and children left the colony, sacrificing their stake in the association, which amounts to a minimum of 60*l.*

They were given a few pounds apiece when they left, but when
(1728)

I saw them they were on the verge of destitution. I found Mr. Lane, the present chairman of the association, prepared to give me all the information I asked for, but to him the articles of association and agreements signed are as the code of the Medes and Persians, and any infringement thereof must be summarily dealt with. He does not admit such things as extenuating circumstances, justice means to him the law according to the letter; a man is either "straight" or he is "not straight," and in the latter case out he should go.

It is certain that a few more such secessions would ruin the movement, would disgust the Paraguayan Government at the failure of its efforts, and would give the British colonist a bad name in South America.

It is not improbable that the liquor question may be the cause of another dispute. To begin with, if a large number of colonists (say 500 and upwards) arrive, many of whom have only lately become teetotalers, it is more than likely that there will be an occasional case of drink. If the offenders are expelled, their friends may possibly secede as has just happened.

Danger of
fresh
secessions.

In any case, when the liquor question is put to a vote there is certain to be at least a minority in favour of moderate drinking. The moderate drinkers will then have the option of submitting or seeking their fortunes elsewhere.

Another question which may cause differences is that of nationality. Mr. Lane told me he had "no reason to be enthusiastically loyal"—(I believe he has lived but little in a foreign country before)—and that a vote would be taken before long which would probably result in the adoption of Paraguayan nationality. On this point he differed with everybody else to whom I had spoken, and the first thing the seceders did was to apply to the British Consulate for support and protection.

Almost the only complaint of the seceders which I found to have some serious grounds was that they had been misinformed as to the country to which they were going. I think they have little cause of complaint, but the Tebicuari-Mini which flows through the Colony is *not* navigable, and the settlement is about 33 miles from the railway.

Misleading
information
published in
"New
Australia."
Success of
colony
endangered
by extreme
"straight-
ness" of
chairman.

The paper of the association, "New Australia," published in Sydney on September 16, 1893, contains a letter "about South America" by the Rev. T. E. Ashe. This letter undoubtedly contains serious mis-statements.

Under good management and on reasonable lines, the colony should prove a great success, but it is not improbable that Mr. Lane's views may be found too "straight," and his administration too strict for ordinary men.

If, however, he succeeds in carrying out his ideal he will found a "peculiar people," like Cromwell's Ironsides, and like them they may accomplish great things.

Liberality of
Government
to seceders.

I should add that the Government offered land at the "President Gonzalez colony" to all the seceders, except those who had been expelled, thus giving further proof of their good-will.

The settlers numbered 252 souls when they disembarked. Since then there has been one death, two births, three members have been expelled, and 82 have seceded, so that those at present at the settlement number 168.

On New Year's Day there were three marriages, which completely exhausted the stock of marriageable girls.*

The "President Gonzalez" Government Colony.

This colony was created in pursuance of a decree dated Asuncion, December 17, 1891. "President Gonzalez" colony.

It is situated in the district of Cáa-zapa, near Pirapó, and consists of 12 leagues of land bounded on one side by the Paraguay Central Railway, and on the other by the River Pirapó. It is chiefly covered by virgin forest in which lapache, urundai, and other valuable hard woods abound. The soil is sandy and of a reddish colour and is extremely fertile.

The ground is higher than the surrounding country and is well-watered.

The following are some of the principal bye-laws:—

Art. 1. The land of the colony shall be divided into blocks of eight squares (the square is about 100 yards) frontage by eight squares deep, with a road on its four sides. Each block shall be subdivided into four lots equal to 16 superficial squares. Regulations.

Art. 2. To each agricultural family two lots shall be delivered, or half a block (32 squares) at the price of 2 dol. Paraguayan, the square of 10,000 varas payable in ten equal annual instalments, or if the colonist prefers to pay at sight, for 1 dol. the square. The colonist must also pay the expense of demarcation and placing land marks on his lot, such payment should not pass 4 dol. for each lot of 12 squares, payable in 10 equal annual payments, and at sight for those who pay cash for the allotments.

A married couple is considered a family.

Unmarried men are only admitted when they have proved themselves industrious.

According to Art. 3, if a family distinguishes itself by its industry, &c., for more lots of land, 16 squares in each lot, shall be conceded to it on the terms mentioned in Art. 2, and the family that in two years from the date of their installation in the colony have cultivated and sown 16 squares shall be presented with half a block of 32 squares.

According to Art. 6 each family will be provided with tools specified, a cow and calf, a yoke of oxen, &c., at cost price, the debt thus contracted to be paid off in three instalments at the end of the 2nd, 3rd, and 4th years.

Art. 7 provides that all seeds the colonists can sow during the first year shall be given them free.

According to Art. 8, 40 c. a day for each adult and 20 c. for each child shall be given to those families who cannot maintain themselves during the first six months, half of this debt to be

* Subsequent information shows that the colony is rapidly disintegrating.

cleared off at the end of the fifth and half at the end of the sixth years.

Meat is to be sold to the colonists at cost price and a general store established for their convenience.

Visit to
colony.

Señor Lopez, Minister for Foreign Affairs and Colonisation, had particularly requested me to visit the colony in which he takes the greatest interest, and I was also anxious to see the place, as I had done all in my power to induce the colonists who had left the "New Australian" settlement to seriously consider the offer of land at "Gonzalez" made to them by the Government, in preference to wandering off in search of work.

Clearings in
virgin forest.

We therefore proceeded from Villa Rica to Gonzalez by rail. We were received by Señor Jacquet, the manager, to whom I had brought a letter of introduction from Señor Lopez, and this gentleman kindly provided us with horses, and acted as our guide over part of the colony. At a short distance from the station we turned into a narrow "picada" or lane cut through the virgin forest. Similar roads are cut parallel to each other at equal distances. On each side of the road at intervals were clearings planted with maize and mandioca. The first of these we visited, evidently the "show" clearing, belonging to a Frenchman. This man had cleared a space of about 10 acres in 13 months.

Industrious
Frenchman.

Great fertility
of soil.

When we looked at the dense forest of hard-wood trees towering above a tangled mass of creepers and undergrowth it seemed almost incredible that so much could have been accomplished by a single man (by no means a Hercules) whose principal instruments had been an axe and a box of matches. The little rancho was surrounded by maize, mandioca, maní (pea-nut), tobacco, beans, sugar-cane, alfalfa, melons, and every sort of vegetable. Some wheat had been grown, but was of poor quality perhaps owing to bad seed. The colonist showed us a little hollow which he had converted into a miniature paddy-field, and the rice was coming up luxuriantly. What we actually saw growing represented a small fortune for this hard-working Frenchman.

Number of
crops per
annum.

The ground yields two to three crops of maize in the year and alfalfa can be cut four or five times. For the first year after the forest has been cut and burnt the ground remains clean, and the only agricultural instrument required is a sharp stick.

The second year, however, weeds spring up and the plough and hoe must be used to give the plants cultivated a chance in the struggle for existence. This was by far the best and most extensive clearing, but the other colonists (French, German, and Poles) all seemed to be doing well, in spite of having lost their first crop owing to drought and locusts. They have easy access to the railway, and Asuncion and Villa Rica provide markets for their produce. I saw two clearings belonging to Paraguayans which showed how much work they can do when they like. It is Señor Lopez's pet idea to stimulate the energy of his countrymen by introducing industrious and intelligent colonists, and if he succeeds in doing so, Paraguay may once more become the prosperous country it was under the rule of the Jesuits and of the first Dictators.

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ON THE

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P E R S I A.

MESHED.

Acting Consul-General Yate to the Earl of Kimberley.

My Lord, Meshed, May 12, 1894.
I HAVE the honour to transmit herewith a Report on the Trade of Khurasan for the Financial year 1893-94 by Vice-Consul Ringler Thomson.

I have, &c.
(Signed) CHAS. E. YATE.

Report on the Trade and Commerce of Khurasan for the Financial Year 1893-94.

ABSTRACT of Contents.

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The result of the last year's trade is both surprising and satisfactory. But this is solely due to two causes which will not probably operate again. The main cause is the arrangement the Russian Government have recently come to with the Amir of Bokhara to extend their customs system to his territory, and their intention to shortly place a strict customs cordon along the whole of this frontier. Until now goods have passed through after paying only nominal dues, and prohibitive duties have not been levied until they reached Samarkand. Last year a committee of
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General remarks.

Russian officers assembled in Transcaspia to arrange for the introduction of these new customs regulations, but the result of their deliberations has not yet transpired. It is certain, however, that these regulations will now shortly be enforced, and our Indian merchants are in great dread that the best part of their trade will be stopped. They have accordingly brought up very large quantities of goods, and are trying to get them across the frontier before the prohibitive duties are enforced. It is not likely, however, that much damage will be done to our trade by these regulations, however stringent they may be, for much as the Russian may wish to exclude British goods, there are among them necessities which they cannot supply themselves or obtain elsewhere nearly so cheaply, and these they will be compelled to receive at nominal rates, *e.g.*, tea which cannot be brought by them from China by other routes, except at a much greater cost than is at present paid for it. To raise the price of tea in Bokhara and in Central Asia would be equivalent to raising the price of the British workmen's beer, and would be followed by much the same consequences. Therefore probably tea will pass through as before, also indigo, muslin, &c. But piece-goods and other articles which Russia herself can supply will probably be rigidly excluded and even confiscated, as at Samarkand, if discovered. The second cause which has operated to bring us some success this year, strange to say, has been the unstable state of exchange. The fluctuations in silver and in the paper rouble have been most erratic, and business under such circumstances either stands still or degenerates into pure gambling. We, however, appear to have benefited by this for two reasons.

First of all the state of exchange has caused both the Russian and British merchants to raise their prices, but the former have raised theirs a good deal higher than the latter. This has had the effect of turning the scale, as regards piece-goods, entirely in our favour. Formerly the Russian article, though inferior, was preferred because it was cheaper. Now the prices have become more equalised, and though the British article is still somewhat dearer it is now preferred to the Russian.

Secondly our merchants are men of more substance and content with smaller profits. That is the conclusion come to by a Russian paper called the "Kavkaz," published at Tiflis, and it is correct. The article in question, dated last January, deplores the condition of Russian trade in Persia, and urges the Russian merchants to shake off their lethargy.

There is no doubt that the Russian Government and some Russian merchants are making also strenuous efforts to improve their trade in this direction. Bounties are granted to exporters of sugar, piece-goods, &c. But it is pretty certain Russian trade with Khurasan, though it has not advanced much during the past 2 years, because of the cholera epidemic, the instability of exchange and other causes, is bound all the same to steadily advance if not to make rapid strides in the near future. The Russian Government considers trade in

these parts as one of the greatest factors in the Central Asian Question, and for that reason actually pays her subjects to export their wares to Persia instead of to other parts of the world. And wherever one goes in Persia, even in out of the way districts as remote as Sistan, the Russian Government Agent will be found.

During the past year, for the two reasons already given, the imports of British goods showed a very satisfactory increase. A little more green tea and a great deal more black tea were brought to Meshed. All the green tea and a large quantity more which remained on hand from the previous year passed on to Russian territory. Twice the amount of indigo was brought; very little French sugar and none from India, an enormous quantity of spices, and 50 per cent. more piece-goods. It is necessary here to emphasise what is stated in the foot-note on each page of the statistics at the end of this report, viz., that last year the rate of exchange was calculated at 39 krans to 1*l*., and this year it has been calculated at 54 krans. Also prices have risen considerably all round. Therefore a comparison of the figures now given with those of former years will not show, except very roughly, to what extent trade has improved or declined.

The Russian imports amounted, on the whole, to about what were brought here the previous year.

It has always been found quite impossible to ascertain here the value of the actual exports from Khurasan to India, for most of the goods are consigned in the first instance to Yezd and Kirman, and others, such as saffron, hides, and skins, are sent from Kain and Sistan where there is no British agent. The figures obtained here are quite insignificant. During the past year there appears to have been a great falling-off, but such was probably not the case. There is no means now of ascertaining what turquoises are exported, as the farming of the mines has passed from a Meshed merchant to the Governor of Nishapur. Only about one-third of the amount of opium is said to have been exported. In view of the evidence taken by the recent Opium Commission in India it may be as well to reiterate here what was stated in the last report regarding the baneful effect of the drug on the population of Khurasan. There are no two opinions about that here, either among Persians themselves or Europeans. The extreme cheapness of the drug places it within the reach of the poorest beggar.

The exports from Khurasan to Russia were something under those of the previous year. The amount of wool and cotton exported was about the same. An enormous quantity of grain was also exported, but as the traffic is illicit no figures are procurable. This wholesale export of wheat is having a very disastrous effect on the province, and it is no exaggeration to say that, in consequence of it, three parts of the population of Khurasan suffer very great privations.

It may not be out of place to explain how this comes to pass. In the first place, as mentioned in the last report, Persia is a very poor country, and even after an abundant harvest has only
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sufficient corn to feed her population at a cheap rate. All payments to the peasantry are made in kind, and many of them rarely touch money. The proprietor of the village gives the seed and water, and the labourers cultivate the land, receiving as their wages half the crops. If the proprietor finds the bullocks for ploughing and threshing he takes a greater share. He also pays the taxes.

Water is the main factor, and it has an equivalent value to gold in Persia. Hundreds of thousands of acres of arable land are left uncultivated simply because there is no water. A village is not of course necessarily held by one proprietor. There may be a dozen or twenty; but the conditions are the same. Each has his share of water, with its adjacent land. The ordinary labouring man eats half a man* of bread per diem, or one kharwar 80 mans per annum. If he has a wife and two children they eat another kharwar 20 mans, or in all an average family consumes 3 kharwars of wheat per annum.

Now the most corn a fortunate peasant will earn by the above arrangements after a good harvest is from 3 to 4 kharwars, and after a moderate harvest from 2 to 3 kharwars. This is the outside limit for the mass of the peasantry when all goes favourably. In some districts, such as Sabzawar, enormous quantities of cotton are grown at the expense of wheat, and this is in itself causing much mischief. But in the ordinary district only enough cotton is grown for the wants of the people. This the good wife spins and weaves and fashions into the family clothing. Rape and sesame are also grown for their oil, and pulse and coarse beans and a little tobacco and more or less fruit. If the peasant gets his 4 kharwars of corn he generally does not get more of the others than suffices for his wants, but whatever surplus he has he barter for a few head of sheep or sells in order to procure the very few, for him, remaining necessities of existence. The sheep he hands over to a shepherd who keeps life in them as best as he can in the winter (one quarter of the sheep of Khurasan succumbed to the cold last season) and takes them off in the summer to the hills, where he can graze them and also find a little water. The shepherd receives no pay but gets one out of every ten of the lambs, and is allowed to take the milk one day in seven. From this sheep's milk is made butter and cheese and curds and karoot or dried curds. Very little cow's milk is used in Khurasan. The wool of the sheep (about 3 lbs. from the two shearings) goes to the owner. This is the sum total of the income of a fortunate peasant in Khurasan, and from it the Governor of the district and his myrmidons, the Kadkhuda of the village, and others exact a goodly share.

Such casualties as sickness, births, marriages, and deaths all carry their expenses with them, and it is not an uncommon occurrence for the water supply itself to fail, through the choking

* 1 kharwar = 100 mans; and 1 man = 6½ lbs.

up of the underground canal. In that case there are no crops at all.

Thus these simple people eke out an existence which at the best is far from an enviable one, for they inhabit mere mud hovels without windows and with a hole in the centre of the roof to let out the smoke, and the filthy state of their villages is indescribable. In winter too they suffer much from the severity of the weather and the want of fuel and warm clothing. Therefore, at the end of the winter they generally find their stock either exhausted or running very low and the great festival of Nauroz at hand. Formerly, the peasant knew that if his stock failed there was no hope of replenishing it. He would have to go without his Nauroz festivities. That made him careful. But now things are altered. He knows that a week or two before the festival the Russian speculators will commence to appear on the scene and to offer the proprietor advances of money to sow cotton for them, the seed of which they provide, or to buy up in advance the best part of his crop of wheat. The ignorant peasant is led to agree to bartering a part of his share too, and when the harvest is over he finds he has not enough corn to carry him through winter. If the proprietors and peasants resist the temptation till the time of the actual harvest, the result is the same. The wheat goes at half price, the peasant finds after a few weeks that he has not enough to carry him through the winter; and worst of all there is no corn at all left for towns like Meshed with 70,000 inhabitants. Last year, for instance, the crop was a fair one, but so much wheat was exported that the price of bread in Meshed was four times as high as after an abundant harvest when there was no exportation: so that the whole wages of a well paid servant, in the employ of a European, if he had a wife and two or three children, did not suffice for the bread alone of the family. This led to two or three riots in Meshed which were nearly followed by very serious consequences. The Shah is constantly issuing the most stringent orders prohibiting the export of wheat, but nobody in the north pays any attention to them. Strings of 50 or 100 camels laden with corn may be seen crossing the frontier daily after the harvest by the main road. Thus in an ordinary year the export of corn means semi-starvation to three parts of the population.

The official returns of Transcaspia show that 2,113,079 poods of corn were carried by the railway and exported from Transcaspia in 1891. It would be interesting to know how much of this came from Persia and what quantity also the troops consumed.

The speculator finds that he can purchase wheat at such a cheap rate in Persia, that he is able to export it to Europe and sell it cheaper there than that which comes from Russia proper itself, the great wheat supplying centre of Europe. The speculator is in no way to blame. He comes with ready money and gets the most he can for it.

It was expected that after the violent outbreak of cholera experienced here in the summer of 1892, Meshed would be again visited by the epidemic last summer, especially as thousands of

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the corpses had not been properly buried; but it did not appear till the autumn, and was then brought by the pilgrims from Resht and did not last long.

Earthquake.

On November 17, 1893, the thriving town of Kuchan, 100 miles from Meshed, was entirely destroyed by an earthquake. Without any previous warning in the shape of sound or trembling of the earth, the first shock at about 7:30 p.m. sent the town down like a pack of cards, killing 5,000 people and 15,000 cattle, or more than one-third of the inhabitants and half the cattle. Here in Meshed the shock was very severe and lasted some seconds. Since then and until quite recently the shocks have been almost incessant at Kuchan and of great severity. A noise like the discharge of a battery of guns would be heard in the adjacent hills and would be immediately followed by a wrench which would, in some cases, throw a man off his legs. The misery which this earthquake has entailed is indescribable. The stables were all on the ground floors of the houses, and the corpses of the animals are still under the ruins, but not properly buried. Nevertheless, the people have erected sheds on these ruins made from the beams and woodwork they have been able to extricate from them. Several of these huts have fallen in during later shocks and many more lives have been lost in that way. The stench is still overpowering. No assistance of any kind was rendered to the sufferers; and the past winter was the coldest that has been experienced for 20 years. Often the thermometer showed 40 degrees and 50 degrees of frost, and often in one night there would be half-a-dozen shocks or more so violent that the people dared not remain in their huts.

Exchange.

The manager of the branch of the Imperial Bank of Persia at Meshed has kindly contributed the following remarks regarding the state of exchange and its effect on trade:—

“The depreciation of silver has severely affected the trade of this province. Russian trade has, I think, suffered, on the whole, more than British Indian trade. Sterling exchange has fluctuated between 39 krans and 54 krans to the 1*l*, and now remains at about the latter rate. Rupée exchange has fluctuated from 245 krans to 300 krans to the 100 rs. Rates have come down during the last 2 months and are now quoted 270 krans to 277½ krans, but quotations are exceedingly unreliable, and business, on the whole, very difficult indeed.”

RETURN of Articles Imported into Northern Khurasan via
Bombay, Bandar Abbas, Kirman (or Yezd) during the Year
1893-94.

Articles.	Meshed.	Kuchan.	Total.		Passed on to Russian Territory.	
			Currency.	Sterling.	Currency.	Sterling.
	Tumans.	Tumans.	Tumans.	£	Tumans.	£
Tea—						
Green ...	619,920	45,220	665,140	123,174	671,270	124,309
Black ...	125,840	22,247	148,087	27,424	61,942	11,471
Indigo ...	56,300	...	56,300	10,426	3,100	574
Sugar—						
Loaf ...	1,358	...	1,356	251	...	...
Crystallised ...	...	...	...	...	...	...
Piece-goods ...	148,070	1,922	149,992	27,775	17,596	3,259
Cotton yarn ...	44,400	...	44,400	8,222	350	65
Copper sheets ...	22,470	975	23,445	4,342	13,960	2,585
Tin ...	2,570	...	2,570	476	...	...
China basins for Bokhara and other chinaware	3,080	...	3,080	570	2,710	502
Books ...	7,900	...	7,900	1,463	3,200	593
Paper ...	...	...	...	...	...	...
Ginger, preserved...	1,090	...	1,090	202	1,120	207
Drugs ...	1,650	10	1,660	307	30	6
Coffee ...	...	...	...	...	...	...
Spices ...	27,885	207	28,092	5,202	14,763	2,734
Coral ...	4,850	...	4,850	898	4,700	870
Glass beads...	2,100	...	2,100	389	400	74
Miscellaneous ...	2,400	...	2,400	444	...	...
Total ...	1,071,881	70,581	1,142,462	211,565	795,141	147,249

NOTE.—Last year rate of exchange was calculated at 39 krans = 1l. This year it has been calculated at 54 krans = 1l.

RETURN of Articles Imported into Northern Khurasan from
Russian Territory during the Years 1893-94.

Articles.	To Meshed.	To Kuchan.	Total.	Sterling.
	Tumans.	Tumans.	Tumans.	£
Sugar, loaf	82,995	..	82,995	15,369
" crystallised	40,550	..	40,550	7,500
Candles	12,360	2,174	14,534	2,691
Kerosine oil	16,225	8,177	24,402	4,519
Piece-goods (including broad cloth, cotton prints, &c.)	142,880	19,488	162,318	30,059
Iron, iron goods, nails &c.	6,530	6,722	13,252	2,454
Steel	953	491	1,444	267
Brass, brassware, and brass wire	3,670	1,299	4,969	920
Glass and chinaware	22,595	4,362	26,957	4,992
Gold lace, &c.	900	..	900	167
Paper	3,580	318	3,898	722
Glass panes and mirrors	2,371	39	2,410	446
Lead and tin	1,560	..	1,560	289
Sewing machines	330	245	575	106
Vitriol	1,400	705	2,105	396
Cochineal	2,850	..	2,850	528
Cutlery, haberdashery, fancy goods	1,300	..	1,300	240
Matches	6,580	244	6,824	1,264
Leather	..	9,521	9,521	1,763
Cotton yarn	450	64	514	95
" rope	155	1,755	1,910	354
Sack cloth	440	9,136	9,576	1,773
Cigarettes and tobacco	2,620	..	2,620	495
Chairs	340	153	493	91
Amber	300	..	300	56
Trays	50	..	50	9
Wooden spoons	170	..	170	31
Miscellaneous	3,774	669	4,443	823
Saffron	600	..	600	111
Total	358,478	65,562	424,040	78,523
Goods imported from Merve and Bokhara—				
Wool	470	..	470	87
Carpets	1,550	..	1,550	287
Camel-hair cloth	1,200	..	1,200	222
Hides	2,050	..	2,050	379
Skins	2,700	..	2,700	500
Leather	2,370	..	2,370	439
Silk, raw	19,570	..	19,570	3,624
" piece	700	..	700	130
Pumpkin seeds	..	..	..	..
Horse clothing	700	..	700	129
Saddlery	660	..	660	122
Miscellaneous	480	..	480	89
Total	32,450	..	32,450	6,006
Grand total	390,928	65,562	456,490	84,531

NOTE.—Last year rate of exchange was calculated at 39 krans = 1/. This year it has been calculated at 54 krans = 1/.

RETURN of Articles Imported into Northern Khurasan, viâ Turkey,
Tabriz, and Teheran during the Years 1893-94.

Articles.	To Meshed.	To Kuchan.	Total.	Sterling.
	Tumans.	Tumans.	Tumans.	£
Broad cloth	28,700	..	28,700	5,315
Piece-goods of all sorts	49,400	..	49,400	9,148
Matches	2,190	..	2,190	406
China and glassware ..	2,300	..	2,300	426
Cutlery, watches, fancy goods, &c.	13,200	..	13,200	2,446
Gold lace, &c.	3,500	..	3,500	648
Glass beads	300	..	300	56
Black tea	80	..	80	15
Total	99,670	..	99,670	18,460

NOTE.—Last year rate of exchange was calculated at 39 krans = 1*l*. This year it has been calculated at 54 krans = 1*l*.

RETURN of Articles Imported into Northern Khurasan from
Afghanistan during the Years 1893-94.

Articles.	Value.	
	To Meshed.	Sterling.
	Tumans.	£
Postins	3,300	611
Barak	2,830	524
Carpets and woollen bags..	12,870	2,383
Wool	..	..
Sheep and lamb skins ..	27,410	5,076
Pistachios	5,840	1,081
Silk, raw	100	18
Seeds	4,116	762
Manna	10,095	1,869
Opium	..	..
Fans	520	96
Dyes	3,169	586
Miscellaneous	590	109
Total	70,840	13,115

NOTE.—Last year rate of exchange was calculated at 39 krans = 1*l*. This year it has been calculated at 54 krans = 1*l*.

RETURN of Articles Exported from Meshed to India during the
Years 1893-94.

Articles.	Value.	
	Currency.	Sterling.
	Tumans.	£
Turquoises	..	..
Silk, piece	6,500	1,204
.. raw	3,350	620
Opium	30,700	5,685
Carpets	900	167
Adafata	2,240	415
Miscellaneous	1,640	304
Wool	180	33
Total	45,510	8,428

NOTE.—Last year rate of exchange was calculated at 39 kran = 1/. This year it has been calculated at 54 kran = 1/.

RETURN of Articles Exported from Northern Khurasan to Russian
Territory during the Years 1893-94.

Articles.	From Meshed.	From Kuchan.	Total.	Sterling
	Tumans.	Tumans.	Tumans.	£
Wool	31,585	168,725	200,310	37,094
Cotton	520	178,955	179,475	33,236
Grain	..	..	..	..
Almonds	485	1,404	1,889	350
Dried fruits	5,345	5,031	10,376	1,921
Tobacco	510	665	1,175	218
Shawls	30,750	..	30,750	5,694
Carpets	28,955	..	28,955	5,362
Skins	28,340	5,797	34,137	6,321
Silk, raw	..	..	..	..
.. pieces	3,650	..	3,650	675
Turquoises	400	..	400	74
Walnuts	105	135	240	44
Leather	1,745	588	2,333	432
Country cloth and prints	7,120	1,960	9,080	1,681
Barak	..	..	..	..
Posters	190	415	605	112
Sacks	50	..	50	9
Country shoes	490	265	755	140
Saddlery	1,200	..	1,200	222
Miscellaneous	8,408	1,488	9,896	1,833
Total	149,848	365,419	515,277	95,418

NOTE.—Last year rate of exchange was calculated at 39 kran = 1/. This year it has been calculated at 54 kran = 1/.

RETURN of Articles Exported from Meshed to Afghanistan
during the Years 1893-94.

Articles.	Value.	
	Currency.	Sterling.
	Tumans.	£
Lemon juice	..	..
Fruits	47	9
Sugar, candied	290	54
Combs	100	18
Silk, piece	2,600	481
Dyes	200	37
Shawls	150	28
Turquoises	..	..
Miscellaneous	1,235	229
Total	4,622	856
Foreign goods passing through Meshed to Afghanistan—		
Piece goods	38,050	7,046
Sugar, loaf	3,120	578
„ crystallised	390	72
Iron and steel	478	88
„ manufactures	130	24
Candles	60	11
Cutlery, haberdashery, and fancy goods	6,800	1,259
Glass beads	..	..
Kerosene oil	20	4
Drugs	320	59
Cotton yarn, English	..	..
Vitriol	130	24
Paper	105	19
Miscellaneous	180	33
Total	49,788	9,217
Grand total	54,405	10,073

NOTE.—Last year rate of exchange was calculated at 39 krans = 1l. This year it has been calculated at 54 krans = 1l.

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1894.

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N^o. 1440.

DIPLOMATIC AND CONSULAR REPORTS ON TRADE
AND FINANCE.

PERSIA.

REPORT FOR THE YEAR 1893-94

ON THE

TRADE OF THE PROVINCE OF AZERBAIJAN.

REFERENCE TO PREVIOUS REPORT, Annual Series No. 798.

*Presented to both Houses of Parliament by Command of Her Majesty,
JULY, 1894.*

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Reference to previous Report, Annual Series No. 798.

P E R S I A.

TABREEZ.

Mr. Wood to the Earl of Kimberley.

My Lord,

Tabreez, June 20, 1894.

I HAVE the honour to transmit herewith my Trade Report for the Province of Azerbaijan for the year 1893-94.

I have, &c.

(Signed) CECIL G. WOOD.

Report on the Trade of the Province of Azerbaijan for the Year 1893-94.

ABSTRACT of Contents.

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The following tables of export and import are based upon the Statistics. statistics furnished me by the Tabreez custom-house authorities, but, having found that in many items these amounts did not represent the business actually done, I have had to increase or diminish the values according to the information afforded me by independent merchants.

The imports show a falling-off of 441,540*l.*, and the exports Imports. of 189,834*l.*, compared with the totals attained in the preceding year.

(1827)

Under this last heading a difference of 40,000*l.* at least is attributable to the fact that "Tombaku" (Narghile tobacco) is now no longer forwarded to Turkey via the north, for the Turkish Monopoly Company, in whose hands it is, have found it to their advantage to send it via Bushire. They are thus enabled to warehouse their stock in Alexandria, and have only to pay the Turkish dues, amounting to 3 piastres per kilo., as it is required and withdrawn, whereas transmission through Tabreez would entail the immediate payment of duty on all stock on its crossing the frontier.

LIST of Exports from March 21, 1893, to March 21, 1894.

Articles.	Value.	
	To Europe and Turkey.	To Russia.
	£	£
Cotton-cloth, plain	426	4,240
Raisins	1,180	31,574
Dried fruits	12,000	..
Almonds	441	35,581
Hides, skins, leather	428	12,238
Tombaku	..	1,218
Carpets	42,000	7,114
Colonial goods	620	2,491
Tea	..	3,111
Rice	798	46
Coloured cottons	..	533
Tobacco	..	666
Shawls	21,658	572
Orpiment	68	643
Opium	4,377	..
Wool and cotton	500	511
Silk and wastes	666	..
Beeswax	..	600
Gall nuts	322	789
Dyes	176	468
Edibles and liquors	..	1,333
Sundries	2,440	7,789
Total	88,100	111,517
Grand total	199,617	

List of Imports from March 21, 1893, to March 21, 1894.

Description.	Value.		Remarks.
	From Europe, exclusive of Russia.	From Russia.	
	£	£	
Cotton goods, gray and plain	74,554	..	Manchester goods
Cotton goods, coloured..	114,204	20,240	Manchester goods, with exception of 920 bales from Russia
Woollen goods	17,000	..	From Bradford, England
Cloth, woollen	25,400	320	From Austria, Germany, and Russia
Silk and velvets.. ..	6,688	..	From France principally
Gold laces, threads	6,700	..	From Bavaria
Glassware	8,609	9,168	From Austria, Germany, and Russia
Sugar	..	48,888	From Russia
Matches	4,050	40	From Austria principally
Petroleum	..	3,977	From Russia
Tea	27,000	..	From England and British colonies
Spirits and wines	1,834	410	From France principally
Paper	1,260	1,500	From Austria and Russia
Drugs	573	93	From England
Linen	348	96	From England
Indigo and cochineal	499	1,056	From British India
Candles	305	450	From France and Russia
Wooden goods	117	260	From Austria and Russia
Haberdashery	26,670	..	
Ribbon and laces	4,500	..	
Sundries	1,993	673	
Metals	1,300	766	
Total	323,604	87,937	
Grand total	411,541		

General Remarks.

Azerbaijan is the wealthiest and most populated province of Persia. Its revenues, amounting to some 250,000*l.*, represent a quarter of the revenues of Iran.

Its population, as nearly as can be estimated in a country where the census is unknown, totals some 2,000,000 souls, of whom about 200,000 inhabit the capital of Tabreez, the largest town in Persia, and the centre in the past of the greatest commercial activity. It, however, still preserves a moderate trade.

Enormous quantities of wheat, barley, raisins, and almonds are harvested yearly, but owing to the lack of roads and consequent cost of transport, much of the cereals is left to rot in stores.

Urumiah.

The great salt lake of Urumiah which might be made into a cheap and efficient means of transport between the wealthy districts around it and Tabreez, still floats but three 20-ton sailing boats, which belong to the Governor of Maragha, who farms the monopoly of the transport and allows of no competitor in the lists.

Reasons of the Gradual Decline of Trade and Commerce in Azerbaijan.

In the past Tabreez enjoyed the privilege of being the "entrepôt" for European produce coming to the northern provinces of Persia. The opening of the Suez Canal came as the first blow to its supremacy in this line and the stopping of transit through Russia put an end to it.

Goods now find their way to the southern provinces principally through Bushire and Baghdad.

Ispahan and Shiraz have now become the "entrepôts." Teheran drawing the greater part of its requirements from Russia. The capital in former years used to provide itself almost exclusively from Tabreez.

The province of Ghelan and Khorassan are furnished by Russia.

Transport.

The rates of transport on the Bushire route are considerably cheaper than those of Trebizond-Erzerum, where for the last year they have ruled at $3\frac{1}{2}$ l. per kanter (500 lbs. weight) as against half the amount merchants were accustomed to pay.

Another, and, I may say, a most important cause of the very unsatisfactory state of trade of this year is the great depreciation in the price of silver, which from 3s. 2d. per ounce in 1893 has now fallen to 2s. $3\frac{1}{2}$ d. per ounce, or a decline of almost 30 per cent.

Goods being sold here on a long credit, merchants who calculated their cost on the exchange ruling on the day of sale, found themselves when the time came for remitting, faced by large differences, owing to the constant decline of the white metal.

Various Dues, Commercial Usages, &c.

Dues.

Sugar pays $5\frac{1}{2}$ per cent.; tea pays 10 per cent. for natives and 5 per cent. for foreigners, who have the privilege of paying in kind.

Commercial usages.

Cottons are sold at 11 months' or 25 months' date; cloth is sold at 4 months' to 8 months' date; sugar, strictly cash; tea, strictly cash.

Weights and measures.

The miskal equals 24 nokhsands equal 4.6 grammes.

The maund or batman of Tabreez equals 1,000 miskals for dry measures, but the batman of sugar, tea, flour, spices and native drugs only equals 640 miskals.

Exchange.

For some time past business transactions have been subjected to great disturbances through the general vacillation in the price of silver, or rather the depreciation in the value of that metal, and traders in countries such as this where the silver currency itself, to begin with, is not of the highest character, and where gold as a medium of exchange is unknown, have been subjected to great losses.

The Persian kran is a silver coin of which 10 make a toman. With its equivalent in copper mintage it forms the staple currency of the country.

20 shais "black money" (copper) go to a kran.

As for the nominal unityyclept toman it has fallen from its grand estate during the 13th century, when it represented 1,000 dinars.

The dinar being a coin of 52 grains and very nearly equal to 10s., a toman in those days was therefore almost equal to 5,000l.

It may be interesting to know, on the authority of Mr. J. Rabino, the chief manager of the Imperial Bank of Persia, that a forced paper currency was put into circulation at about the same period, and that Tabreez had the doubtful honour of being the first city initiated in such a commodity.

Since 1891, when the toman was worth 5s. 9d., its value has been decreasing until to day, when it only represents 4s. 6d. Value of the toman.

The general depreciation in silver has had much to say to this fall in the value of the currency, but a great deal is also due to the will of the farmer of the Persian Mint at Teheran, who acknowledges no control, uses imperfect machinery, and cares not to employ the aid of competent chemists or engineers.

Notwithstanding the haphazard manner in which the Mint proceeds, the loss to the public is not such as one might be led to expect, for on the testimony of the said Director of the Imperial Bank of Persia 2 per cent. at most covers the deficiencies in the value and weight of the kran.

The kran has therefore enjoyed for many years a fictitious value superior to its intrinsic worth, but this may be accounted for by the fact that about half the currency coined in any one year, either returns, in one shape or other, to the Imperial Treasury where it is lost to the circulation, or is hidden by its lucky possessors, whereby the supply remaining in actual circulation does not satisfy the demand.

The values of different currency to-day are as follows:—

				Krans.
l.	..	..	..	= 50
Paper rouble	..	..	..	5 to 5½
Turkish lira	..	..	..	44 to 46
Silver franc	..	..	..	2 to 2½

*Various Routes and Distances, in Day's Marching, by which
Merchandise arrives in Persia.*

Trebizond on the Black Sea, Baghdad, and the Persian Gulf.

From Trebizond to Tabreez, from 32 days in winter to 70 days in summer, when the beasts of burden are permitted to pasture along the route.

Tabreez to Teheran, 14 days to 18 days.

Baghdad to Teheran, via Khanakhin, Kermanshah, and Hamadan, about 28 days, according to the season.

Bushire to Teheran, about 46 days, including stoppages.

Bushire to Shiraz, 10 days.

Shiraz to Ispahan, 14 days.

Ispahan to Teheran, 14 days.

Teheran to Tabreez, 18 days.

*Manner in which the Import Business through Trebizond is
carried out.*

Most of the principal importers of Tabreez have correspondents residing at Constantinople, who look after the purchase and transmission of European merchandise for them.

The goods are sent direct to a commission agent at Trebizond. On arrival of the consignment at that place it is opened by the custom-house officials, who, after verification of the contents, deliver a "teskeré" indicating their nature and value.

The commission agent then gives a guarantee that the said goods are destined for Persia, and engages at the same time to produce proofs, after a reasonable delay, of their having passed over the Turkish frontier, for, on the non-production of such evidence, the goods are considered as having remained and having been sold in contraband in Turkey, and in this case the commission agent is called upon to pay a double duty, amounting to 16 per cent.

The goods are then sealed and forwarded to Erzeroum, where the seals are examined and certificates given according to the exigencies of the case. Caravan drivers then take possession of them, accompanied by lists.

In practice, of course, matters do not proceed so smoothly as the above would make it appear, for, during mid-winter, snows and storms interfere with the transport traffic, and merchandise often accumulates at such a rate at the Trebizond custom-house that on the re-opening of the roads, or rather tracks, it often happens that there are not sufficient beasts of burden for the purposes required of them, whence delay, much increased cost of transport, and consequent losses are entailed upon importers beyond the usual deficiencies caused by robbery or the negligence of the drivers.

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1894.
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No. 1376.

DIPLOMATIC AND CONSULAR REPORTS ON TRADE
AND FINANCE.

PERSIA.

REPORT FOR THE YEARS 1892-93 AND 1893-94

ON THE

TRADE, &c., OF THE CONSULAR DISTRICT OF
ISPAHAN.

REFERENCE TO PREVIOUS REPORT, Annual Series No. 113, page 6.

*Presented to both Houses of Parliament by Command of Her Majesty,
MAY, 1894.*

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1284. Canton	1d.	1343. Saigon	1½d.
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1286. Warsaw	½d.	1345. Cadix	1½d.
1287. Peking	½d.	1346. Trebizond	1d.
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1289. Manila	2½d.	1348. Amapala	½d.
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1294. Montevideo	1½d.	1353. Trieste	3½d.
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1296. Teneriffe	1d.	1355. Teneriffe	½d.
1297. Stettin	3d.	1356. Havana	2d.
1298. Rome	2½d.	1357. Paraguay	½d.
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1303. Buenos Ayres	½d.	1362. Syra	2½d.
1304. Tangier	2½d.	1363. Suakin	1d.
1305. Somali Coast	½d.	1364. Callao	1d.
1306. Porto Rico	1d.	1365. Piræus	2d.
1307. Paramaribo	1d.	1366. Stettin	2d.
1308. Oporto	1½d.	1367. New Orleans	2½d.
1309. Naples	½d.	1368. Angora	1d.
1310. Salonica	2½d.	1369. Antwerp	2d.
1311. Valparaiso	2d.	1370. Genoa	3½d.
1312. Mozambique	1d.	1371. Batoum	2d.
1313. Odessa	1½d.	1372. Rouen	2½d.
1314. Honduras	2½d.	1373. Santo Domingo	½d.
1315. Batoum	4d.	1374. Nantes	1½d.
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No. 1376.

Reference to previous Report, Annual Series No. 113, page 6.

PERSIA.

ISPAHAN.

Consul Preece to the Earl of Rosebery.

My Lord,

Ispahan, February 27, 1894.

I HAVE the honour to forward herewith a Report on the Trade of Ispahan during the years 1892-3 and 1893-4, also such information as I could acquire in my visits to Yezd, Kerman, Shiraz and Sultanabad in the same years.

I have, &c.

J. R. PREECE.

Report of a Journey made to Yezd, Kerman, and Shiraz, and on the Trade, &c., of the Consular District of Ispahan.

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Road from
Ispahan to
Yezd.

On October 24, I left Julfa, Ispahan at 2.45 p.m. The road passed through the village and followed the usual route to the town, but instead of crossing by the usual bridge it followed the south bank of the river to Pul-i-Kaju, leaving that bridge on the left and continuing along the same bank. The river was crossed by the old bridge near to the village of Shahrستانak at 4 p.m. Now, at this time, it has but little water in it, no real flow, and only pools. I passed through the village of Shahrستانak; it is more or less in ruins. After leaving it, the road bore due east, through a mass of cultivation, and crossed a number of leads from the river by means of small bridges. Young crops were already showing up well. The villages to the right and left were all in ruins. 4.30 p.m., passed the village of Kerdabad. 5 p.m. arrived at Kharaskan, distance 8 miles. The village is large, and covers a considerable amount of ground, but a good deal of it is in ruins. I passed through it and camped in open fields to the east, cholera being in the place.

The village of Kharaskan belongs to peasant proprietors. It is watered by kanāts (underground watercourses) and canals from the river. It has water sufficient to cover 80 jerebs (20 acres) in 24 hours. There are four mahalahs or parishes, containing 2,000 houses. Population 12,000. The village owns altogether 2,000 jerebs of ground, has 30 mazras (ground under cultivation without houses) dependent on it. Taxes, 40,000 krans per annum.

The population is almost entirely employed in agriculture. The women make a rough cloth called karbaz for the Ispahan market.

October 25, 6.30 a.m.* Barometer, 24.825 in.; thermometer, 39°.

Left at 7.44 a.m. Road for 1½ miles passed through cultivated ground, a large number of pigeon towers about the fields, the major portion of them were in good repair but contained no birds. The road gradually ascended and passed between the two isolated hills which are such a feature in the landscape east of Ispahan.

At 3 miles I passed a small hill about a mile to the left. It had some ruins on the top. Another three-quarters of a mile brought one to a cross road towards Gulnabad. At 6½ miles, the road began to descend gently towards the basin of the Zainderud. The plain was dotted with numerous villages, most of them being more or less in ruins. At 9 miles, we arrived at the small village of Kal'ah Sar-i-ab. There was no one about to give any information.

The road thence passes through an alluvial plain, which is cultivated only near the villages. The plain is quite flat but covered

* Ispahan is 5,100 feet above the level of the sea.

with wild liquorice, camel-thorn, and a short grass like twitch. Just beyond the above village the road bifurcates; the left-hand one leading to Besiyan, my destination. At 13 miles, I passed the village of Housseinabad, about 1 mile to the right. At 14 miles, about 4 miles to the right, a very fine prominent minaret is seen, the village near being called Wandilan. Beyond it, on the Mayar hills, is a very curiously shaped hill like a Norman church.

At 16 miles I passed through the village of Fasarūn. This place is apparently fairly prosperous. The road has veered slightly to the south. At 17½ miles we passed the small village of Kimiar, and at 19½ miles came to a newly built village called Jallilun not yet inhabited. It belongs, it is said, to Agha Nedjefy. At 20½ miles we arrived at the village of Besiyan.

The village is fairly large and is mainly distinguished by the ruins of a very fine mosque and minaret. The building of both is beautiful. The bricks are laid with a precision rarely seen in Persia. On the top of the minaret is a cufic inscription. The mosque and minaret are quite distinct buildings, although adjacent. Inside the mosque, round the base of the dome, there is also a cufic inscription and another around the Mehrab. The letters in the latter are formed of bricks, the spaces between the several letters being filled with gatch (plaster of Paris), which has been cut and moulded into Arabesques, designs of flowers, etc. The interior of the Mehrab is in the stalactyte style. The spaces here again being filled with gatch which has been treated in the same style as around it. Outside the mosque to the east is a courtyard; the buildings surrounding it being decorated with inscriptions in modern tile work.

From the whole style of the mosque, I believe it must be very old. The oldest inhabitant tells me that a man once read the inscription on the top of the minaret, and said it gave the date of 47 A.H. This statement is incredible as it would place the building of it only some 10 years after the subjugation of the country by the Arabs. However, I should say that the mosque must be well over 700 years old, otherwise its walls would have been decorated with lustre tiles, which, at that time were mainly used for this sort of work, especially as it was so near to the centres of that industry at Ispahan, Nain, and Kashan, where there were large factories devoted to this lost art. The only work which I have seen in any way approaching this was in the mosque of Sultanyeh, near to Zenjan, which was built by Shah Khodabander, where the dado of the original mosque was carried out in a design "à jour" but the material was brick, made on purpose, the general effect being very fine; some specimens of this may be seen in the South Kensington Museum.

Fesarun belongs to the Shah, it is watered by leads from the river. Pays 100 tumans taxes a year, owns 8 pairs of oxen for plough, 50 karwars (32,500 lbs.) of barley and wheat sown yearly, 30 houses, 150 people

Bisiyan belongs to the Shah, it is watered from the river and by wells. 60 karwars (39,000 lbs.) of barley and wheat are sown (1719)

yearly. There are 40 houses, 200 people, and 11 pairs of oxen for the plough. The taxes amount to 100 tumans yearly.

Shahkārām belongs to Karneh about 2 farsakhs (7 miles) off which supply it with labour, 7 pairs of oxen for plough, 100 tumans taxes yearly, 30 karwars (19,500 lbs.) of wheat and barley sown yearly.

October 26. At 6 a.m. Barometer, 24.925; thermometer, 29°. Bisiyan, 21½; total 29½.

The road on leaving Bisiyan proceeded along the plain slightly south of east. At 3½ miles we passed a ruined village. The plain was generally of the same character as that passed during yesterday's march, but in places it was more like the desert, large patches of salt efflorescence appearing here and there. At 4½ miles we came to the village of Marchi, where there were some half dozen black tents belonging to Turks, who are in the habit of bringing their camels to graze in this plain during the winter months. At 6 miles came to a small village among trees, about it some gez bushes; the ground in the immediate neighbourhood is well cultivated. 7¾ miles Madrkuk, a small village with a few trees, in fairly prosperous condition. It belongs to the Shah. There are 5 pairs of oxen for the plough. The taxes amount to 35 tumans yearly. There are 25 karwars (16,250 lbs.) of wheat and barley yearly sown. It possesses 10 houses, with 40 people, and is watered by canals from the river.

10¾ miles the village of Surkan was passed, it is small but has good houses, only a small area cultivated; 14¼ miles passed through the village of Shatur, nobody about, so I could not gain any information. It is a fairly large village with a good sized mosque, the dome of which was once covered with glazed tiles of good design. Population probably 400 to 500 people; it is watered by river.

At 17¼ miles crossed the river which now had scarcely any water in it. The bed was deep, about 12 feet below the level of the surrounding country; it was about 15 yards wide. On the other side of the river the road led across a piece of perfect desert. The river bed was lined with small gez bushes. At 18 miles came to a small square Kal'ah built by Agha Nedjefy as a refuge for man and beast during the winter, it has no wells but a lead from the river runs quite close to it. At 19 miles, passed through the old bed of the river, full of gez bushes; it was somewhat wider than the last, has a ruined bridge of three arches, close by is a large canal from the river, over which the road was carried by a bridge of one arch.

This canal must come from a great distance, as the river bed is many feet below the level of the canal.

20th mile passed on the left hand some ruins of a village.

22nd mile arrived at Ajiya. From a distance this was a most imposing looking place, covering a lot of ground, with houses standing well up, but on entering it, it turns out to be but a mass of ruins; around it are some 25 pigeon towers, all in fairly good repair. East of the town or village are a number of very fine

walnut trees, which give it a pleasant, picturesque look. To the west the outlook is entirely desert, and very dismal.

Ajiya, 22 miles; total, 49½. It belongs to peasant proprietors, who have placed it in the hands of Agha Nedjefy. They own 22 pairs of oxen for plough, sow 90 karwars (58,500 lbs.) of grain yearly; taxes, 900 tumans; 80 houses inhabited; population 350. It is watered by leads from the river. There is a good spring near to it in the old river bed.

To cross the river when in flood the people here arrange a species of ferry at a place where the river is narrowest. A rope is fastened from one side to the other, and to this is tied a raft made of inflated skins, and covered with boards, which are well secured to it. Upon this people and goods are floated across, while beasts swim over. At this point the river is about 30 yards broad; both its banks are very steep.

They told me here that a similar contrivance was in vogue somewhat higher up the stream, and at Rudasht, still nearer Ispahan, there is another bridge.

27th. At 6.30 a.m. Barometer, 24.95; thermometer, 31°. The road bore due east across the plain, which had been under cultivation, but was now fallow. At 2 miles passed a large ruined village, thence through some desert ground, came at 5½ miles to the village of Kafran. This one, like Ajiya from a distance, gave one the idea of being of importance, but when entered turned out to be more than half in ruins. The semi-ruin which has overtaken most of these villages in the Ispahan district is deeper than I had imagined, and dates from the time when the capital was removed to the north, and their main market was taken away from the hard working peasants of these parts. At 6½ miles passed through the village of Farfahān. This village was another case of disappointment in the same way, more than three-quarters of it being in ruins; both villages had good mosques.

Kafran: 3 dungs of it belong to Agha Nedjefy, and 3 dungs to the peasants. It has 30 pairs of oxen for ploughing; consists of 150 houses inhabited; population, 900. Pays 600 tumans taxes; 40 karwars (26,000 lbs.) of wheat and barley sown yearly. Watered by the river, with addition, in summer, of wells.

Farfahān belongs to the Shah. Has 12 pairs of oxen for ploughing; 30 houses, 130 population; 50 karwars (32,500 lbs.) of grain sown yearly. Taxes, 80 tumans.

At 12th mile came to the village of Gurtūn, on the left bank of the river. A square walled place, with corner bastions and fortified gateway. Numerous pigeon towers and other buildings are on the right bank, especially some very fine abambars or cisterns. This village belongs to the Crown. It has 12 pairs of oxen for ploughing; 90 karwars (58,500 lbs.) of grain sown yearly; 50 houses, 200 people. Taxes, 100 tumans per annum.

The river, although so close, is here of no agricultural value to the people, as it is at least 30 feet below the level of the plain. A wheel might be used with much profit. Although they have a lead from the river, yet the water on its way is robbed to such an

extent that Gurtūn, from once being a very flourishing place, has declined to the above. The river here is about 60 yards wide, but has now but little flow. Drinking water is procured from the cisterns on the right bank.

From this point the whole of the slope of the eastward hills, with the various towns and villages dotted about it, is very visible, especially such prominent places as Ghai and Herend on the edge, and Kuhpa under the hills at the top. The road thence keeps to the right bank of the river, passing along some cultivation, and through a great deal of ground which had been under cultivation. At $13\frac{1}{2}$ miles, passed a small village of about twenty houses, called Ashkeran; at 14 miles, passed a small Imamzadeh (new). Thence the road ran through cultivated ground along a large water-course till at $17\frac{3}{4}$ miles the town of Varzina was reached, passed through it, and camped on the eastern side near to some abambers, and near also to the river, which is crossed at its narrowest point by a bridge of seven arches; length of bridge 53 yards, width 18 feet. The foundations of the arches consist of large round stones, cemented by mortar and gatch (plaster of Paris), the upper portion of the piers, as well as the arches, are made of burnt bricks. As a rule, there is but little more water in the river than at present, which is but a mere trickle, but in flood time it rises to the crown of the arches. This bridge is evidently very old, and I was told that there was a tradition that it was built shortly after the Arab conquest. The work is much rougher than that usual to the Sefavean period. Traffic from the Komishah side towards Yezd and Nain passes this way. A large caravan of about 100 camels passed me while I was examining the bridge, carrying wheat to Yezd—it was taking the road by the mountains. Varzina, $17\frac{3}{4}$ miles. Total, $67\frac{1}{4}$ miles. The town belongs to peasant proprietors; 1,000 pairs of oxen for plough; 1,600 karwars (1,040,000 lbs.) of grain sown yearly. Taxes, 3,500 tumans. The town is divided into seven quarters, contains 1,000 houses, population 6,000. It has seven Mazras dependent on and supplied with labour by it. All water supplied from the river.

28th, at 6.30 a.m. Barometer, 25; temperature, 37° .

After crossing the bridge to the left bank the road followed the plain, which had no cultivation. South-east, at 3 miles, passed the ruined village of Diz, on the right bank of the river; this was the last sign of any village or building.

About 3 miles further on the same side of the river were a number of low sand-hills, blown into regular waves. At $12\frac{1}{2}$ miles, came to a sort of cañon, which has been caused by the scour from the distant hills. It gradually widened out and gave out into the river just before the latter opens out into the Gavkhaneh. This cañon is about 600 yards wide at the point where the road crosses it—it has at the bottom a small brackish stream. At 14 miles, came to a halt at a small ābambar known as Goad. Total, $81\frac{1}{4}$ miles. This ābambar has a chamber in front to accommodate travellers; near it, in the south-eastern face of some low hills, is a kandeheh, or dug out (a species of cave). The hill has been excavated

and three fair-sized rooms have been made, making a good place of refuge in bad weather, quite large enough for some twenty-five or thirty animals. A little further to the left are two other ābambar. From the hills above this ambar the whole of the Gavkhaneh could be seen. The form of it is an irregular circle, covered with salt, as white as snow; in the centre a small patch of most intensely blue water. This is surrounded by hills, which gently slope down so as to form a perfect basin of some 20 miles in diameter. As far as could be seen, there is no outlet whatever to the south. The river, previous to its outlet into the Gavkhaneh, has its bed choked with enormous rushes and clumps of gez tree, the bottom being a thick, black, holding mud.

29th, time, 6.30 a.m. Barometer, 24.925; thermometer, 44°.

After leaving the ābambar the road went along the plain, gently rising towards the hills, utterly uninteresting but for the view of the Gavkhaneh on the right, which in the clear morning air was brilliantly white as to its margin, and equally brilliantly blue in the centre.

At 7 miles, passed a small ābambar; at $7\frac{1}{2}$ miles, entered a range of low hills. From the top of one I again made a good survey of the Gavkhaneh, but could not see any outlet to the south.

After entering these hills the road bore away to the east, and rose gradually till it passed the outlying spurs of the Kuh Wadereh, then came round to the south-east, and down hill by the Tang-i-Yaghmish to the plain of Yaghmish. The top of this pass is the frontier line of the Yezd and Ispahan Provinces. Distance run, 15 miles. Total, $96\frac{1}{2}$ miles.

Yaghmish consists only of a caravanserai, said to have been built by Shah Abbas, as is usual with everything which was done in the era of the Sefaveans. Some of it is built of rubble, the gate, and some of the bastions of good brick, as is also the whole of the parapet of the building. Both gateway and parapet are loopholed. Two guards belonging to the Yezd Government occupy it; they are in charge of the road, which is at times much used, and, in consequence, is the happy hunting-ground for robbers from Fars and Ispahan. This year, however, there has not been much traffic, owing to cholera, and the robbers have not reaped a great harvest.

The place has no cultivation, there being but two wells of brackish and bitter water. All supplies for this and Goad had to be brought along from Varzina. The whole aspect of the country is most dreary and desolate, the hills are bare and black, and the plain has but a sparse coating of a low scrub; taking it all in all it is about as bad a spot as I have seen on the plateau of Persia.

October 30, at 6.30 a.m. Barometer, 24.60; thermometer, 32°.

From Yaghmish the road went due east along the barren plain, on the left hand within a few hundred yards was a ridge of bare hills, about 15 miles off on the right another range of similar hills, a few isolated sugar loafed ones here and there in the fore ground. At $2\frac{1}{2}$ miles, passed a salt spring, the deposit very white, large gez

bushes in the bed of the small stream which made its way down from the spring. $3\frac{1}{2}$ miles road to Khalil bifurcated to the left; road still on the plain, scrub more plentiful; at 11 miles came road to right going to Nadoshan bearing south-east was passed. At 12 miles on the left, 2 miles off Kal'ah, Shurāb could be seen on road to Khalil. At 15 miles came to the village of Salv. 15 miles. Total, $111\frac{1}{2}$. Here there was a good clear spring of sweet water, giving a small stream which was led to a tank or pond in the middle of the village. Salv consists of 30 houses, 160 people, taxes, 60 tumans. Partly belongs to the peasant proprietors, remainder is Wakf (sacred). The spring only waters 7 jereeb in 24 hours; about 100 sheep, and a few donkeys. The village owns a good deal of ground, but there is not enough water to cultivate it.

The whole of this plain bears the strongest resemblance to that of Yezdikhist, the ground scrub and general character of it are precisely the same. It appears to me to be only a continuation of that plain, the hills all around come straight off it, having little or no detritus.

To the south-east is a curious bunch of very straight precipitous rocks with clean cut peaks like a saw edge, apparently of lime stone, they are known as the Haft Tahar.

On leaving Salv the road made straight for the village of Haft Tahar, which lies in a cleft of the above hills. At $3\frac{1}{4}$ miles entered some hills, then the road at first gradually ascended but soon became very steep, and at $7\frac{1}{4}$ miles arrived at the village of Haft Tahar. $7\frac{1}{4}$ miles. Total, $118\frac{3}{4}$. It faces due west, from the other quarters it is entirely protected by the main range and its spurs. The village is well up the mountain side and looks down a combe over a very pretty series of gardens and fields laid out in terraces, every available piece of ground being cultivated. The hills tower above the village almost perpendicularly. Altogether the situation of the village and its general surroundings form a very pretty picture.

An old Moollah, who has never stirred from this village for 25 years acts as my host. He was very anxious to know if I belonged to the Mining Rights Corporation, if so, he knows of many good mines and will show me them. Haft Tahar, 6 dung, belongs chiefly to peasant proprietors, some of it Wakf. Taxes, 54 tumans a year, 100 mans (1,300 lbs.) wheat yearly sown, also some cotton in the gardens, it has 20 jereeb, 70 houses, 600 people. Water is procured from a spring above the village and is only sufficient to water 5 jereeb in 24 hours.

The women of the village are all employed in making givas. This is the native shoe, the upper of cotton is knitted on to a sole made of old rags and sinews of sheep, it is very enduring and is generally used in one form or another throughout the country. The sinews are, so to speak, the warp, and the rags the woof. These givas are taken to Yezd and Ispahan for sale, during harvest time some 15 pairs are made daily, in winter about 25 pairs. The price varies according to quality from 2 krans to 5 krans a pair.

October 31, at 6.30 a.m. Barometer 24; temperature, 40°.

On leaving Haft Tahar, the road struck away over a spur of the hills and made across the small plain between these hills and Kuh-i-Salv to an opening in those hills, road bearing nearly due south, I passed through the opening for a short distance, and then came out on to a continuation of the Yaghmish plain. With a glass the caravanserai could be seen at the western end, while in front the village of Nadushan could likewise be seen. Nearly opposite, on the slopes of an isolated hill, to which it gives its name, was the village of Surkh.

At 9 miles, came to an ābambar. At this point the direct road from Yaghmish joined and crossed, making for a pass between the hills to the east, and thence out into the Yezd plain near to Maibut. There are ābambars on this road, but at this season the water has been exhausted. Still carrying on along the plain, at $14\frac{1}{2}$ miles, came to another cross road which I was told came from behind Kuh-i-surkh and joined the above road farther on. This is the main camel road from Varzina to Yezd; it is used chiefly by camel-men carrying wheat; it passes through a place called Khargushi, which I did not see.

At 19 miles reached Nadushan. 19 miles; total, $137\frac{3}{4}$ miles. This place is a small walled town, with good buildings and gardens, but a good deal of it is in ruins. The newest buildings are all outside of the walls. Passed through the town and camped on further side of it on the banks of a dry river bed. The hills immediately over the town to the east are very curious, and seem as if they had been mud volcanoes. The streams of mud have passed around the bases of the lime stone hills, leaving their craggy peaks cropping out of the light-coloured stuff.

Nadushan 6 dūngs, belongs to peasant proprietors. 1,110 tumans taxes per annum (200 tumans are for grazing sheep and 810 tumans for the 6 dūngs), watered from kanāts, 200 jereebis in 24 hours. It has a mill; 700 karwars (455,000 lbs.) of wheat and barley sown yearly. The town consists of 6 mahalahs (parishes), 400 houses (inhabited), 1,720 people, 1,200 sheep, 100 oxen for plough. 31 people died of cholera during the late epidemic.

November 1, at 6.30 a.m. Barometer, 23.50; thermometer, 30°50.

Leaving Nadushan the road kept for some $1\frac{1}{4}$ mile along the river bed, and then bore away to the south-south-east, on the right slope of the hills, which bordered a portion of the same plain as was followed yesterday. At 4 miles, on right passed 2 Mazras, called Abdul and Kushab, then came to a low range of hills on the same hand about half a mile away, about 4 miles long. At $8\frac{1}{2}$ miles, passed Sadrabad at the end of these low hills, direction now due east. At 18 miles, the road gradually ascended to that point when it veered to east-south-east, and at 19th mile it turned due south. Here was a small runlet of water and some mud buildings, but no people about. The road then for 2 miles passed between the hills, always ascending, good going, but somewhat

stony in places, till at 21 miles the head of the pass was reached. This pass is known as Gardeneh Shamsabad. Barometer gave 21·75, 8,500 feet approximately. Hills all around. Then it again turned towards east, bearing down on Nasrabad, which was seen in front lying under a hill. Beyond could be seen the village of Aliabad, under the hill of the same name; this village is on the direct road to Shiraz, passing across the Abergu desert. Beyond Nasrabad were the hills called Shirkuh, fine upstanding bold peaks; in the far distance the Kuh-i-Taft was to be seen. After going 3 miles, came to the village of Himatabad and passed one after the other the villages of Sadrabad, Ramakan, Mirza Mohammad Ibraheem, each of only a few houses, but with all possible ground in the neighbourhood well cultivated. At 30th mile reached Nasrabad.

30 miles; total, 167 $\frac{3}{4}$ miles. In this day's march I noticed a new way of kanāt digging. Two shafts being sunk within 3 yards of each other, the distance from one pair to the next being about 30 yards, the workings being thus run towards each other from each pair. The usual way is to have but one shaft about 15 yards from the previous one. The village of Nasrabad is a fairly prosperous one; it has plenty of gardens and orchards, the ground all around being well cultivated. Here, instead of ploughing, they work with a spade. Four men dig a big square piece out altogether and turn it, a fifth breaks it up with a mallet. The only other place I have seen them work in a similar way is at Soh. Although it requires more labour than with the plough, yet the improved yield must compensate the ryat for his extra expense. Ploughing, as a rule, in Persia only means scratching the earth.

Himatabad, 7 houses, 30 people. Village belongs to Mirza Mohammad, Vizier. 1 jereeb of water; 20 māns (260 lbs.) of wheat sown yearly. No taxes.

Sadrabad belongs to peasant proprietors; 20 houses, 100 people. Taxes, 40 tumans. 7 jereebis watered daily by kanāt; 50 māns (650 lbs.) of wheat sown yearly.

Khodabad belongs to Mirza Mohammad, Vizier; 4 houses 2 jereebis, watered in 24 hours by kanāt; 60 māns (780 lbs.) sown yearly. No taxes, the village being quite new.

Nasrabad belongs to peasant proprietors; 1,200 tumans taxes per annum; 3 mahals (parishes), 200 houses, 1,100 people; 30 jereebis watered in 24 hours by kanāts. 150 karwars (97,500 lbs.) grain sown yearly. Any surplus over requirements of the place taken to Yezd market.

November 2, at 6.30 a.m. Barometer, 22·70; thermometer, 31°.

The road passed over some stony ground, and then down a sharp, stony descent, through the gardens; then came to the bed of river (dry). At 1 $\frac{1}{2}$ mile passed the village of Khariabad.

At 3 $\frac{1}{2}$ miles passed the village of Salabad, the whole way being very stony, and a gradual descent. At 5 miles Khurabad, in the valley, was passed; 8 miles Faizabad, on the right, under the hills. At the 9th mile Sadekabad was passed on the right. 10th mile a fine open stream of water coming from a kanāt. Here the road

from Aberguh *viâ* Aliabad joined. Immediately after crossed the wide and deep dry bed of a torrent. The kanât was taken under it by what is called a shutar garden (camel's neck). The road then gently ascended a long shoot of one of the spurs of the Shirkuh. After passing the crest of this spur at 11 miles, it again descended. Here we came upon stones and boulders of granite. These kept cropping up all along the march ; they mostly showed erosive effects. On the hill-side I could not trace any signs of a granite outcrop. 17th mile passed through the long, straggling village of Ferasha. This village completely commands the gorge, from which it is about 3 miles off. Close to the gorge is a garden of some considerable extent, with a house and out-buildings. Just at this point another deep gorge from the Shirkuh joins. This point commands the roads to Ispahan and Shiraz *viâ* Aberguh. The descent which had become somewhat sharper, crossed again the bed of the torrent. The hills now converged, until at the 19th mile came to a short gorge between them. Road along river bed, and amidst kanâts ; at 21st mile, got into the gardens of Taft, following the river bed all the way. It seemed to be the chief street of the town, having houses, gardens, and little bazaars all along it. At 22nd mile passed the chief mosque and main bazaar, which are some distance back from the river. At 23rd mile arrived at the Bagh-i-Sadr, a fine building, in the midst of a fair well kept garden. Here I put up. Along the banks of the river I noticed a number of people working at namads (felts), Ghileems and Zelus ; the two latter are a species of carpet made entirely of cotton. A number of Guebres, especially women, in their quaint and somewhat picturesque dresses, were to be seen about.

Taft lies in a basin among low hills, spurs of the Shirkuh on the one side, and on the other the ridge, of which Kuh-Darvish and Kuh Tiz are the prominent points. It is a mass of gardens ; the whole place is buried in trees, out of which the dome of the ruined mosque stands up conspicuously. The shrine of a defunct Shah is close by. On a rocky hill are the ruins of an old fort. The place is much used by the wealthy inhabitants of Yezd as a summer resort. Here they come in numbers, fill the gardens with their tents, and go to and fro as business may require. Although the altitude of Taft is but a little more than that of Ispahan, yet the mass of foliage, and the fact that heavy cultivation is always going on, gives it a coolness not often found in the latter place during the summer, and much appreciated by the people of Yezd, who have been subjected to the desiccating sand storms and scorching sun of desert-bound Yezd.

Khairabad 6 dungs. Tax not known. It is in place of the pension granted to the heirs of Mirza Ishmail. One jereeb, watered by kanât in 24 hours ; 12 mans (156 lbs.) of wheat sown yearly ; 3 houses ; population 15.

Farasha, owned by Mayûn ul Mulk, 24 taq, 140 tumans yearly tax, 3 mahalahs (parishes), 100 houses, 500 population, 8 jereeb watered by kanâts in 24 hours, 500 māns sown yearly (6,500 lbs.), many gardens, 8 or 9 dye-houses.

Taft belongs to peasant proprietors, owns four kanāts sufficient to water 180 jereeb in 24 hours, 3,000 mans (39,000 lbs.) sown yearly. The gardens of the place cover more ground than that under cultivation, 200 shops of various kinds, 2,000 sheep, taxes 6,000 tumans yearly. The town consists of 17 mahalahs (parishes), 4 of which are inhabited by Guebres, each mahalah contains about 200 houses, but a large number are uninhabited. Total population about 7,500, of which 1,250 are Guebres.

November 3, at 6.30 a.m. Barometer, 24.80; thermometer, 49°.

The road on leaving Taft continued along the river bed for some 2 miles, and then bore away to the east, the river going due north towards an opening in the hills whence it made its way into the plain. The road was always on a gentle incline. At 4 miles it passed between two rocky low hills, and then the town of Yezd with its outlying gardens and villages was seen at ones feet. At this point the road bifurcated, one branch leading towards the south of the town, the other to the north of it. Both roads were apparently straight and broad, but on approaching the town it was seen that they were much broken and crossed by gardens and cultivation. Several gardens with good buildings lined the roadside, and also some very fine ābambars and ice houses were seen. I remained for some little time in the garden of Kasimabad. Here I was met by the official Estakbal (reception), and then driven into the town, at the gate of which I was met by a number of the Governor's servants and some 20 soldiers, by these, in single file, according to Persian custom, stretched out on each side of the road, I was escorted to the house of Mr. Arter, the agent of Messrs. Ziegler and Company, who had been good enough to invite me to put up with him.

Yezd.

The general appearance of Yezd from the outside is not prepossessing. There are no prominent buildings to relieve the eye, except the Musjid-i-Juma, which has two high dilapidated minarets dominating the whole town.

The chief thing which strikes a traveller is the extraordinary number of wind towers (badgirs), they seem to have been sown indiscriminately in the desert sand and to have come up a superabundant crop. Every house has one or more, so also have the ābambars which are very numerous.

The streets of the place are narrow, dirty, unpaved, and half-filled with sand, the houses are almost entirely built of sun-dried bricks, outside of them nothing is to be seen except mud plastered walls, the inside walls are faced with kiln burnt bricks. Every house of any pretension has at least two stories of underground rooms, some even have three, so that all these houses are very much more below the ground than they are above it. To these underground rooms the wind towers convey the air. In the centre of each compound or yard of the house, is an open shaft of some size going right down to the base of the lowest storey. This provides for the due circulation of the air in the rooms. In some houses an attempt is made to have a small garden, and much con-

sideration is given to the decoration of the walls in the shaft, and the various open spaces are filled with shrubs in pots.

The situation of Yezd is such that none of the disagreeable effects of dampness, even at such a depth is felt, water is not found until some 200 feet is reached.

The town of Yezd lies in a large sandy plain about midway between the ranges of hills to the east and west, and practically quite open to the north and south, the northern plain extending to Kashan, and the Kavar, and the southern, with just a small break at or near Zeinodeen by a spur of the Shirkuh, to Kerman. From the north and eastern sides the winds come down in spring and summer with great force, bringing with them such sand storms that the place becomes as dark as night, while great desiccating heat waves burn up everything in their way. Against the ill effects of these winds the badgirs previously referred to are built, without them and the deep underground rooms life would be nearly impossible.

The sand blown down by these winds, which, if not always strong, are very constant, is to the north and east gradually engulfing the town; gardens and cultivation bit by bit disappear, and it is probable that in the course of time Yezd itself will also disappear, as has been prophesied, and as its predecessor has done if tradition is to be believed.

The Yezdis hold that the original town was some 4 farsakhs (14 miles) to the east of the present one, but that it was completely buried by the sand, and that the people transferred and built a new town on the present site.

The maidans and squares are small and unimportant; there are three, viz.: the Maidan-i-Khan, where the executions take place, the Maidan-i-Shah, and Mil Khatmak.

Of mosques, it now has but eighteen, of which the Musjid-i-Juma is the most important,—it is said to be at least 900 years old. There are but seven madressehs or colleges.

In the bazaars and outside, the town possesses thirty-three caravanserais, fifteen of these are occupied by merchants, whilst eighteen are kept for travellers. There are about forty hamāns in the place.

The main feature of Yezd is the old town, in which is the ark or citadel, where the governor lives; it has walls, with bastions, gates, and a ditch. The ark is, or rather was, heavily fortified, and although not strong enough to stand a regular attack, yet would be quite strong enough, even to-day, to resist the rush of an ill-armed mob. It has evidently been tried, as I saw many bullet marks on its walls.

The bazaars are small, and show nothing of interest to a traveller. The main bazaar is fairly well built and lighted, but the side ones are dark and dirty. The same degree of meanness evident in the streets pervades the bazaars. In passing through both streets and bazaars the entire absence of active life struck me most forcibly. There is no movement at all except just for a few hundred yards in the main bazaar, and even there circulation is

never congested, or free movement impeded, as is to be seen in other chief cities of Persia. It is difficult to believe that this is a centre of considerable trade, yearly rising into more prominent importance.

One feature to be noticed in the town, when looking down on it from a height, is the number of curious tumuli-looking buildings, crowned by small lanterns, covered with oiled paper, or else having a couple of pairs of staring eyes of bottle glass. These are the places where the various manufactures of the town are carried on, and which hide the major portion of the population of the city. In small covered-in rooms, without pretence of ventilation, the people, men, women, and children, from early morning to sunset, and even beyond, work at their trades; and practically live the long day through. It can be imagined, when once an infectious disease attacks the town, how quickly it spreads, and what sad havoc it commits.

Parsee
quarters and
the Parsees.

A visit to the Parsee quarter of the town affords relief to the body and eye; the contrast is very great, the streets are wider and clean, attention is given to free circulation of air. The Parsees are neater in their dress and more cleanly in their persons, and generally bear a more healthy look than their Mussalman neighbours. Their houses are good, and each one is provided with a nice well-kept garden. I visited one of their schools—it was in a large well-built house, with fine open rooms, both for winter and for summer. There were present some 150 boys, who were under instruction and were divided into classes according to their intelligence. Some seven or eight were being taught English, and with it history and geography. These latter two subjects do not enter into the regular course, as they have no books in Zend or Persian to teach from. The boys were squatted round the walls of the rooms, each on his little square of carpet, with his books before him. All were clean and neat in their dress, and it was a treat to see their cheerful bright faces, so very different to the children one sees elsewhere in the country. The schools are supported by funds from a society in Bombay called "The Society for the Amelioration of the Condition of Zoroastrians in Persia." In the Yezd district there are eight schools, viz.: Yezd town has four, and in the villages of Taft, Kuchabyuk, Nasirabad, and Shahabad, one each. In all some 500 boys are educated in Zend, Persian, Arabic, and English. No attention whatever is given to the education of the girls; it is considered quite unnecessary; as long as she can sew and cook, it is all that is considered requisite for a girl.

The Zoroastrians of the Yezd province, according to a census which was taken in February, 1892, numbered 6,908, exclusive of those who were travelling. Besides the town of Yezd, they inhabit the following villages:—Taft, Kasemabad, Nainabad, Rahmatabad, Mohanmabad, Marabed, Kuchabyuk, Nasirabad, Kasmaja, Mazra-i-Sadr, Nasirabad, Elahabad, Houssainabad, Jaafarabad, Mazra-i-Kaluntari, and Sharafabad-i-Ardakan. They have a council of twenty-eight members who are elected by the whole of the community. This council meets once a week regularly,

all questions relating to their internal economy are decided by it, and any questions or disputes arising among themselves are submitted to and decided by this council, as are also questions between Zoroastrians and Persians. All petitions, complaints, &c., sent to His Majesty the Shah, or to the Zil-es-Sultan, are drawn up and signed by the council.

For work with the local Government they have a kaluntar (mayor), who has been given the title of Amin-i-Parsiyan by the Zil-es-Sultan. It is he who has to represent the community before the local Government in any question brought before it from outside.

On any occasion of moment an extraordinary meeting of the council is at once called. I had the pleasure of seeing such a meeting called to consider a telegram from the Zil-es-Sultan. Everything was done with due decorum and order.

The community is made up of merchants, men of means and well known probity, farmers, masons, gardeners and agricultural labourers. As gardeners they are renowned throughout the country, and are in considerable demand. The Shah always has some in his employ in the various palace gardens in and around Tehran. Last year 20 were sent to him, this year 6 have gone.

Some of the men are employed in making a cloth called "shal." The women make their own clothes at home, and also they weave the native cloth called "karbaz."

The merchants are largely connected with Bombay and act as forwarding agents for Mussulman merchants in Khorassan and Bokhara.

There are some 40 priests, who live in the quarter known as Pusht-i-Khaneh-i-Aly. They go out to the various villages in their turn. There is but little doubt that the Zoroastrian in Yezd has a great influence and adds to the wealth and importance of the place. They are known and trusted by all; their probity and upright dealing is beyond question. Their position is acknowledged in a somewhat curious manner. All documents to be legal, even between Mussulman and Mussulman, must be dated, not only with the Persian day, month, and year, but with the Zoroastrian.

During the cholera epidemic, which was very severe in the whole of the province, some 250 Parsees died. If we deducted the 500 who have left, plus these 250, from 6,908, it leaves a present population of about 6,200, allowing for a certain number of births.

The Jewish population of Yezd is small. They have but ^{Jews.} two mahalahs or parishes, the one consisting of 125 houses, the other of 53 only. I could not get even an estimate of their numbers from them, as they considered it unlucky. But by taking the average at 6 souls per house—a high one—it gives a total number of 1,068.

In Yezd the life of these poor people is indeed a hard one. None of them are in any degree wealthy. The major portion live purely from hand to mouth. Some of them do a small merchant business with adjacent cities, such as Kerman, Ispahan,

Kashan and Tehran, but they have no connection or correspondence with Mashbad. Others do a peddling business among the adjacent villages and in the city. Some make a living by spinning silk, but this source of livelihood has been greatly curtailed by the importers of silk from Khorassan and Ghilan who bring it in already spun. A significant fact pointing to their great poverty is that there is not in Yezd a Jewish jeweller. In getting in their debts they have very great trouble, for they are continually put off with excuses.

Building.

In the town of Yezd building and building materials are cheaper than in most places in Persia.

The masons are good workmen and lay their bricks well. They are very clever in arching; making their arches of considerable size with a very low pitch. In consequence the rooms in most houses are large, being nearly square and fairly lofty.

Description.				Prices.		
				Krans.		
Mason..	..	..	..	Per diem	..	2.0
Assistant Mason	..	..	..	"	..	0.90
Apprentice	..	..	..	"	..	0.75
Bricks, kiln burnt	..	..	..	Per thousand	..	35.0
.. sun-dried	..	..	..	"	..	6.0
Lime	..	..	..	Per 5 mans (65 lbs.)	..	1.0
Gatch (plaster of Paris)	..	..	..	" 4 " (52 ")	..	1.0
" " " inferior	..	..	..	" 20 " (260 ")	..	1.0

Food supplies.

The prices of articles in daily use are fairly cheap, the only dear thing, in comparison with other towns, is wheat. Yezd mainly depends upon outside for this, the entire crop of a good year of the whole province is only sufficient for a three months' supply. An average crop is only equal to a two months' supply. Khorassan, Fars and Isfahan all help to keep Yezd in bread stuffs. This year almost the entire crop was a failure owing to "Sen." Barley has become greatly enhanced in price of late owing to the villages about having now taken to mix it with wheat in making their bread. Scarcely anybody but well to do people use pure wheat at present.

PROVINCE OF YEZD.

Yezd is the centre of the province of that name, and it consists of a number of villages in the immediate neighbourhood of the town and of off shoots to the north-east, north-west, south-east and south-west stretching away in long attenuated legs like those of a spider. It is in the hands of H.R.H. the Zil-es-Sultan who is locally represented by a Deputy Governor or Naib-ul-Hukamah, called Mirza Mahmond Khan.

The population of the city of Yezd is about 35,000 at the out-
side. It is mainly a manufacturing one. The whole province has
not more than 75,000 people, and is of very minor magnitude. In
spite, however, of its scanty population, Yezd is a great trade
centre, supplying the provinces of Khorassan, and thence Bokhara,
Karman, Kashan, Hamadan, and elsewhere. It has a number of
wealthy merchants, with capital beyond that usually to be found
in a Persian city. There are some 250 merchants in the place
who have a trading capital of some 2,000,000 tumans. This,
rendered into pounds sterling at the present rates, seems but very
little, but in a poor country like Persia, it means a great deal, and
gives a security and impetus to trade such as is not enjoyed in all
the other centres of the country.

Trade.

The following are the chief exports and imports of the place
from and to foreign countries as well as internal:—

Opium, almonds, assafoetida, silk, cotton, madder roots, also a small quantity of attar of roses. Rosewater is used locally, its price is 1s. 6d. per miscal (one-sixth ounce).	Imports and exports. Exports.
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Wheat, cotton, twist, copper, solder, iron, pepper, cinnamon, coffee, turmeric, myrobolans (black), ginger, sugar, tea, tin, sheets, henna, candles, indigo; cotton goods (Indian, Russian, and Man- chester).	Imports.
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Of the exports of Yezd, the most important is that of this Opium.
drug. It was more largely grown in this province than anything
else, in comparison with their respective values. Various causes
have lately conduced to a decided falling off in the cultivation of
the poppy. In a good year the total output of Yezd was some
1,500 cases, each case weighing about 130 lbs. An average output
would be about 1,000 to 1,200 cases. In speaking of the opium of
Yezd, I include not alone that only grown in the province, but
also that produced in Khorassan, Tabbas, and even in the Herat
district. The crude stuff is sent to Yezd, where it is manufactured.

During the past year, viz., 1891-2, the crop has been but a
small one. The prices ruling in China and London were low and
not remunerative, consequently only about half the usual amount
was sown in the Yezd district, and this more for speculative pur-
poses than for anything else. To still further reduce the output,
the crop for want of proper spring rains was a practical failure.
Hence the maximum quantity of opium manufactured in Yezd
was somewhat under 500 cases. 182 lbs. of the crude material in
Yezd makes one case of 130 lbs. manufactured article. Of
Khorassan's crude material, 195 lbs. makes one case of 130 lbs.

A certain portion of the crop is specially manufactured for
consumption in the local markets of the country, and is almost
entirely supplied by Yezd. It is made into sticks, and is used for
smoking and eating.

Opium smoking is very prevalent in Yezd, and it is said that
(1719)

more is used in this place in that way than in any other town in Persia, with the single exception of Kerman.

This habit is gaining ground daily throughout the country.

In years past adulteration of the drug was very common, but owing to many and heavy losses, by having his cases thrown on his hands, or else being sold at 50 per cent. under current rates, the Persian merchant has in this case learnt wisdom, and has almost entirely discontinued the practice.

Cotton.

Cotton is grown in fair quantities. During the year some 15,000 māns = 195,000 lbs., value about 2s. per 13 lbs., was exported to Russia. Previously the export was to India, but under present conditions the trade does not pay. The above does not give any idea of the total crop, as cotton is largely used in local industries. Some of it is made into twist, which is used in making a carpet called Zelu, peculiar to the district, and also for making the native cloth called Karbaz. Besides the ordinary white cotton, there is also grown a yellow species (*Gossypium religiosum*, L.); which is entirely used locally by the Parsees, who spin it and weave it into cloth, which they use for their own dress. The cloth is very tough and durable. Previously it was exported to India and England.

Almonds.

These are now mostly exported to Bombay, but in good years, *i.e.*, when the European crop is not an average one, kernels, both sweet and bitter are exported to England. Last year the exports was about 1,040,000 lbs. This year there has been a very large decrease.

Assafœtida.

There used to be an export of some 500,000 lbs. of this gum, about 150,000 lbs. being from Yezd, and the balance from Tabbas, but owing to the way it was adulterated the price has greatly fallen, and in consequence the trade has nearly died out. In neither of the last two years has one tenth of the amount been exported.

Madder roots.

Adulteration and a consequent declining market has also practically killed the export trade in this article which used to be fairly large with Bombay. Prices have fallen from 1s. 8d. per 13 lbs. to 4d.

Saffron.

Saffron was sent into the Yezd market from Burugird and thence exported to Bombay. Adulteration has produced the same result as in the previous cases.

Tobacco.

Tobacco is grown in some quantity, but not of a high class. It is not usually exported in any quantities but is consumed locally.

Henna.

Henna is not a local product, it is grown in the Bām district and is brought here, where it is ground and prepared. Some 5,000,000 lbs. are annually brought into the place, prepared and sent out again to the markets all over the country. Some is exported to the Caucasus, and about 40,000 lbs. is annually sent to Bombay.

Silk.

The amount of silk grown in Yezd is comparatively small and insufficient for the local supply, but Mazanderan and Khorassan supply Yezd with the balance of its requirements.

During the last few years disease has attacked the crop and almost entirely spoilt it.

Imports.

Quite the largest and most important import is cotton cloth in its various forms. Manchester is the chief source of supply, but some is brought from Bombay, mainly white sheeting. Small quantities also of Indian hand printed cloths are imported. From Bombay too, the major portion of the cotton twist comes.

Russia is now trying to find a market in Yezd, and a small Russian trade. quantity of her prints are annually sold in the place. These are mostly Turkey red twills, which, although six inches narrower than the English goods of the same character, obtain a greater demand and command a higher price. I was told that as long as a piece of Russian stuff was in the market no English print of like design could command a sale. The reason for this is not far to seek the Russian cloth is better, stronger and more durable, and of a better colour, whilst the dyes are more lasting. This was made apparent to me beyond doubt. The Persian peasant is poor and cannot afford to buy often; when he does buy he requires a thing which will, after heavy wear and strong washing, still hold together and keep its colour. He finds that the Russian article fulfils his requirements better than the English, although somewhat dearer, and in consequence he buys it. Happily so far the Russians have not printed especially for the Persian market, but only send such prints as are made to be sold in their own home markets. When they take to printing designs for this special market, then we may have to face a far stronger opposition than we have at present.

Yezd is the centre of supply for Khorassan and it even extends Trade with Bokhara and Afghanistan. its trade to Bokhara. In days bygone Afghan merchants used to come here to supply themselves with Manchester and other goods, but the prohibitive duties put on by the Ameer have completely stopped all such trade. Some years ago there were native merchants here whose entire business was done with Afghanistan, but their trade has now been entirely killed.

A curious phase of Yezd trade is that it supplies Kerman with English piece goods to the extent of some 5,000*l.* annually.

Russia does not attempt to bring either shirtings or sheetings. It manufactures only such good qualities which demand a price never to be obtained in Persia. Such of the above goods as come to Yezd come either from England or from Bombay. In the latter place they are bought either by the native merchants or by the Zoroastrians. Every native merchant with a fair capital deals direct with Bombay.

The total import of Russian goods does not at present exceed 600 bales. Russia has a commercial and political agent here, a merchant, a man of considerable means and good position. He has his agents and correspondents at Subzawar, Mashhad, Askhabad for Bokhara, and also at various places in the south.

The demand from Khorassan during the past year had fallen off very considerably. No doubt the late cholera epidemic has had something to say to it, yet that is not the main cause. The buyers are apparently holding their hands in hopes that the

rumour which credits Russia with the intention of largely increasing the bounty or drawback on manufactured cotton goods may make a considerable difference in the prices now prevailing.

Tea.—In the last 3 years a very large and important trade in this article has sprung up between Yezd and India, and unless anything untoward interferes it shows likelihood of further expansion. In the year 1890–1, about 3,500,000 lbs. of all classes of tea were imported. In 1891–2, 6,000,000 lbs. were imported. Of this three-fourths was green tea, which almost entirely goes to Bokhara. During the cholera epidemic a large quantity went to the Capital, as it was supposed to be a specific against the disease. During this time the prices went up some 500 per cent., otherwise green tea is but very little used in the country. This tea is imported in bags or bales of about 182 lbs. each; only the very best qualities are sent in cases of 50 to 60 lbs. each. Most of this tea is bought by Panjābi merchants, who are established at Bokhara with agents at Mashhad and Yezd. It is landed at Bander Abbas and forwarded *via* Yezd and Mashhad to Dushak and thence to Bokhara. The balance is brought by Yezdi merchants in India and forwarded through their own agents all over the country.

The closing of Afghanistan for transit has caused this increase in the tea trade by this route. Although so much longer, and in consequence more expensive, it is preferred by the merchants as being the more secure and certain route.

The obstructive action of the Customs Officer at Mashhad in delaying delivery of the goods of British merchants and not acknowledging the properly authenticated custom passes of Bander Abbas and Yezd may act very detrimentally on the development of this important and growing trade.

Sugar.

There have been some large fluctuations in this article lately. Russia used almost entirely to supply the Yezd market, to the detriment of the Marseilles and Mauritius suppliers, but now she has entirely ceased to send any sugar whatever. Russian sugar was not liked by the Persians, as its sweetening qualities were inferior to those of the Mauritius article. This latter is now imported largely; it is refined in Yezd and thence is exported to other places in Persia. Among the religious portion of the population it has a large demand, as it is known that in the refining nothing of an unclean nature is used. There are fifteen of these refineries in the town.

Industries.

I have, in previous paragraphs, shown that the making of loaf sugar, the preparing of henna and of opium for the rest of Persia is done here. Probably the next most important industry is the printing of cloths; this is chiefly done on Karbaz, the native cotton cloth, entirely by hand and with pure vegetable dyes.

Curtains, handkerchiefs, coverlets, &c., are thus made and are used locally. The printing is coarser and not nearly so artistic or effective as that done in Ispahan.

A good quantity of this is locally produced, it is mixed with Cotton twist. that imported from India and used in making Zelu, a carpet made solely in Yezd and its districts.

A large amount of dyeing is done in the place in the shape Dyeing. of colour cloths, which are used in the house and out of doors by the people.

Yezd used to do a large trade in felts, which were mainly Felts used for carpeting the rooms on the sides and top. Two (namads). pieces of equal length and of a similar pattern, about 40 inches wide and from 3 to 6 yards long, and some 1 to 2 inches in thickness were put down each side of the room touching the walls. A cross piece of the breadth of the room and $2\frac{1}{2}$ yards deep was placed at the top of the room and the centre between them would be filled in with a good carpet. The host would sit in a corner on the top felt, and the guests would range themselves according to their rank right and left of him down the room. Now, owing to the advancement of European ideas and a desire to have the whole room covered by one carpet, this industry has largely decreased. Still in Yezd, fine and beautiful namads are still made, sometimes of enormous size, sufficient to cover entirely a large hall. These are mostly made for the notables in Tehran.

The silk stuffs of Yezd are very good and are much thought of Silk. by Persians; they are very widely in demand, extending all over the country, and even into Russia. They are made up into curtains, handkerchiefs, and dress pieces. The weavers are very clever and imitate the productions of Europe with marked success. They turn out goods of silk and cotton, and of silk alone as occasion demands. The supply locally grown does not suffice for the needs of the place; some 75,000 lbs. are annually imported from Resht and Khorassan. This year only some 2,500 lbs. have been brought from the former place, owing to the new crop having been almost entirely exported to Russia. The total output in a good year is but some 10,000 lbs.

Yezd is the centre from which various roads radiate to other Roads. important cities of Persia. To the north is the main post road to Tehran, passing through Nain, Kashan and Kom. One road to Ispahan branches off at or near Nain, going *viâ* Qupa. Two others have been shown in the itinerary of my route from Ispahan to Yezd. To Shiraz the road goes through Taft and Aliabad, crossing the desert to Aberguh, and thence striking the main Tehran-Ispahan-Shiraz post road at Dehbeed. Another road can be followed through Shahr-i-Babek and Niriz. To Kerman there are two roads, the one to the east of the mountain range *viâ* Bafk and Zarand, and that to the west *viâ* Anar and Bahramabad. This latter is the post and telegraph road. To Bander Abbas the road chiefly used is *viâ* Shahr-i-Babek, and Saadatabad, generally known as the Sirjan road, either following the post road to Khushkuh, and thence going to Shahr-i-Babek, or else diverging from the post

road at Mohammudabad, 12 miles from Yezd, and going *viâ* Mahriz to Shahr-i-Babek. In troublous times, however, caravans more commonly use the Saadatabad (Sirjan) road, which joins the main road at Bahramabad. There they can get adequate protection, and have the advantage of frequent telegraph stations.

It is surprising that European merchants in Yezd do not use one of these roads in preference to the Shiraz one more than they do. They have many things in their favour. They are more direct, and on the average of the year some 20 krans per karwar (1,300 lbs.) cheaper; in these days of keen competition no mean saving. At some periods of the year the difference is very much more to the advantage of the Bander Abbas road, where the freights sometimes are as low as 100 krans per 1,300 lbs., whilst on the Bushire-Shiraz road they never are lower than 160 krans per 1,300 lbs. This difference is so great that the English merchant who imports copper, grey and white shirtings, and heavy goods generally, can never compete with the native merchant who gets his goods by the Bander Abbas-Saadatabad road. The time taken on the road *viâ* Shiraz is, as a rule, about 40 days, whilst *viâ* the Bander Abbas-Saadatabad road it generally takes a caravan 45 days. As far as I could gather, there is nothing to impede the general use of this latter road. Carriage is always to be obtained in Bander Abbas, except about the Nao Roaz (21st March), when camel-men and muleteers are grazing their animals. I was told that the importance of this road had not escaped the eyes of one firm, who were making enquiries on the subject, with a view of importing their goods to Tehran by this way.

To Mashhad there is but one road used; it passes through Pusht-i-Badam and Badar Askan.

It will thus be seen that, with so many roads radiating from it, Yezd cannot but be a place of very considerable commercial importance.

Carriage.

The main source of carriage in Yezd is the camel. It is supplemented to a small extent by mules and donkeys.

In the town and district there are some 5,000 camels, owned by the local inhabitants; these are almost entirely employed in the trade to the south. A great obstacle to the perfect flow of trade is the want of adequate exports. Often camels have to go to Bander Abbas empty.

All the mules are brought from the outside; none are bred in the district, and few are owned there.

Donkeys are numerous, and are used as transport to other places; but the major portion are employed locally.

There are no horses of any breeding to be found in the province; good ones are imported from outside. It cannot be even said that horses are bred in the place; no stock is kept by any of the best people. There is no pasturage anywhere about to afford grazing for the mares and foals.

Road Yezd to Kerman.

Left Yezd on 10th November. The road bears away towards the hills on the south-west through some gardens; it is very deep in sand, and heavy going. A conspicuous spot in the low hills to one's right front is the Dakhma, or the Tower of Silence, of the Parsees. At 4 miles the village of Nejefabad is passed; it has a fair quantity of gardens, with about 20 houses. After passing this village the road improves and is firmer, the ground about being under cultivation. At $7\frac{1}{2}$ miles Rahmatabad, with its gardens and some 70 houses, is passed; and at $10\frac{1}{2}$ miles Mohammudabad is reached. This place is in a good prosperous condition; it covers a great deal of well cultivated ground. There are some 300 houses, with a population of some 1,600 souls. At 19 miles Jaghiabad, a small village, with good stream and many gardens, is passed. After crossing a piece of pure desert at $22\frac{1}{2}$ miles, Sar-i-Yezd is reached.

Sar-i-Yezd, lying somewhat low, is a broken-down looking place, covering a good deal of ground; it has about 120 inhabited houses, with a total population of 650 people.

In the distance, about 4 miles off to the westward, under the hills, is to be seen the village of Mahris. This place has many gardens and looks in a fair prosperous state; it has about 1,100 inhabitants. The main water supply for Yezd and its surrounding cultivation comes from the Mahris hills.

From Sar-i-Yezd to Zeinudeen the road continues to ascend a little all the way. At 8 miles, the ruins of some gardens and a few houses were passed, but no inhabitants. In the distance on the plain to the left there were also some ruined villages. At 12 miles we came to the corner of a low range of hills, and at 17 miles arrived at Zeinudeen. Total distance $39\frac{1}{2}$ miles.

The Chapar Khaneh and ruined caravanserai are the only buildings here. The water is very salt and bitter. In the caravanserai there were 6 sowars of the Afshar tribe, well mounted and armed with Werndle rifles, besides these there were also 10 tofangchis (or matchlock men).

The plain to the East shows up very white from the salt efflorescence.

November 11. The road leads across the desert along the slope of the hills to the right, and scarcely any scrub of any kind is to be seen. After going 10 miles we passed successively in the plain on the left the following villages, Mehdiabad, Baharduran, Housseinabad, and Faizabad, which are about 3 miles away, and appear like a small oasis, in what otherwise is practically a desert. The telegraph line which follows this route strikes a bee line across the plain, and is generally very wide of the stations and also of the road.

Kermanshahan was reached at 14 miles. Total, $53\frac{1}{2}$ miles.

It consists of a telegraph station, Chapar Khaneh and a caravanserai in bad repair. The Chapar Khaneh, however, is very good, clean, and comfortable.

Here were stationed 10 sowars of the Afshar tribe, well armed and mounted, also 10 tofangchis. The road from here on to Anar is reported very unsafe. It is continually subjected to incursions from the Fars and Ispahan sides, by all sorts of tribesmen. Some few days before I passed, some flocks were stolen by robbers from Fars, they were followed for some 120 miles by 15 of these sowars, who killed and otherwise accounted for 7 of the robbers, and recovered the sheep.

From Kermanshahan the road for 6 miles skirts the hills and then gradually ascends and enters some curiously coloured low hills looking like tumuli, utterly bare and barren. A short easy descent again brings one down to the plain which here bears a more kindly aspect; crossing this plain for 6 miles we arrived at Shams on the slope of the hills to the right.

15 miles; total, 68½ miles.

There is nothing here but the Post House, in good repair, and a caravanserai which has been put into somewhat better order than most of the others. The water supply is fairly plentiful, and although brackish, is vastly better than that at Kerman-shahan.

November 12. The road continues along the same plain, at first over somewhat rolling ground, but afterwards it is quite flat and barren, no grass, no camel thorn, a pure desert; in some places stony and in others sandy with a very deep, light sand, which was freely blown about by the wind and made travelling disagreeable.

This is one of the chief points of attack of the depredators from the West.

At 14 miles we arrived at an ābambar (covered water tank) with a good supply of sweet water.

At 20½ miles we passed, on the left, a prominent Imamzadeh on a small hill.

At 21½ miles we arrived at Anar; total, 90 miles.

This seems a prosperous place. The Post House is good having just been put into proper repair. There is a good caravanserai and a prominent mosque.

There is a curious old mud fort with a double wall round it on a hill, round which the main town is clustered. On the right is a range of hills of which the most prominent peak is Nar Kuh. Lines of kanāts have been dug from these hills and deliver their water at Anar where every available piece of ground is brought under cultivation.

At this point I was met by an officer of the local governor who had been sent forward from Bahramabad by the prince's orders to entertain me. At Anar there was a detachment of 20 of the Afshary sowars under a Naib (Lieutenant). The ground subject to raiding does not extend to the south of this place.

Anar has 22 kanāts each one supplying a special portion of cultivation. The place belongs to peasant proprietors, it is under the Zābet of Bahramabad, 50,000 mans (650,000 lbs.) of grain yearly sown. Taxes 2,000 tumans, 800 habited houses, 5,000 population.

November 13. After leaving Anar the road passes through

cultivation for some 4 or 5 miles then on to desert, which at first is very sandy, and then as it approaches Baiaz stony, the last three miles having a gentle ascent.

This is a small village with a lot of mulberry trees about it, a good sweet water stream, a new caravanserai and an excellent, clean, nice Post House. Distance, 16 miles; total, 186 miles.

A detachment of soldiers consisting of a sergeant and 10 men is stationed here. They are well dressed and well set up, quite a novel sight in such an out of the way place.

One-third of Baiaz belongs to Nurullah Khan; two-thirds belong to government; one-third taxes are hypothecated to pay of the above; two-thirds pay a rent of 800 tumans, and 260 tumans taxes. The water supply is from kanats, which supply in 24 hours 30 jereeb, 300 houses, 1,000 inhabitants. 600 mans (7,800 lbs.) grains are sown yearly.

Leaving Baiaz the road passes over the same sandy desert with a little camel-thorn here and there, the ranges of hills running parallel to the road on right and left. On approaching Khushkuh it passes for the last 3 miles through a lot of well cultivated ground with large crops of cotton still standing, water plentiful and good; all of which is brought in kanats from the western range of hills.

The village is small, but it has a fort, a caravanserai, and clean Chapar Khaneh. These latter on this road are a treat to see and render use of tents quite unnecessary. About 6 tofangchis only are kept here.

Distance, 16 miles; total, 22 miles.

Khushkuh belongs to peasant proprietors, one kanat which supplies in 24 hours 50 jereeb. 6,000 mans (78,000 lbs.) grain are sown yearly. There are 200 houses, 600 population, and 1,050 tumans taxes yearly paid.

November 14. The road passed through a country of light sandy soil with camel-thorn and tamarisk.

At the 14th mile we came to Himatabad, a small walled village like a caravanserai. It belongs to peasant proprietors. No taxes are paid. Kanat lately made, 20 houses, 70 population, 20 jereeb watered in 24 hours, 1,000 mans (13,000 lbs.) grain sown. Vast numbers of kanats are all about, and also some very curious clusters of small tumuli none of them being 20 feet high. There did not seem to be any order in which they were placed so that they could scarcely be covering tombs. They probably are the ruins of old gardens or watchmen's houses which have been covered in the course of ages by the ever drifting sand and light earth which prevails in these parts. The hills still bound each side of the plain, though here they have somewhat opened out.

Approaching Bahramabad or Rafsinjan, as it is indiscriminately called, although Rafsinjan is really the district, villages and gardens are fairly prominent.

At 21st mile arrived at Bahramabad; total, 43 miles.

We passed through it to Kamalabad, about a mile beyond to south-east, where I was put up in the house of Mirza Aly Nakhy Khan, the Zabet, or Deputy-Governor of the district.

Bahramabad is the chief place or town of the district of Rafsinjan. This bulūk (district) consists of some 90 villages, which stretch themselves out in a long line, running from west to east. They lie under a low sand ridge, which covers them to the north. The district is very fertile, and generally prosperous. Large crops of wheat, opium, and cotton are grown. The cotton was still standing, and was being gathered.

Bahramabad has a small, fairly well built bazaar, with 3 or 4 caravanserais. The population is about 8,000 in the town, and some 50,000 in the entire district. The taxes amount to 6,500 tumans per annum.

There is a fair trade, mainly done by Parsees and British Indian subjects. There are some few Parsees and about 15 Hindoos of Shikapore who do a very good export business with India, chiefly in cotton, almonds, pistachio, and assafetida. The import in return are sugar (loaf and moist), prints, pepper, &c. This year only some 130,000 lbs. of cotton was sent, but the average crop runs to about 650,000 lbs. The young wheat and poppy were showing up well. During the last three years the wheat crop has been a failure, owing to "*Sen*": an insect that has been a great curse to this district.

NOTE.—I cannot find out what this "*Sen*" is; it is like a flying bug, reddish olive in colour, with heavy broad shoulders. When smashed it emits an abominable smell.

November 15. Left for Kerman. The Prince Governor had most kindly sent for my use a carriage, tents, and attendants of all sorts. From this point I was perforce his guest. Everything that it was possible to do to conduce to my comfort was done.

The road went by and over cultivation, following a line of kanāts for some six miles, until it again got into the open plain, which was very sandy, and with but little vegetation.

From about 10 miles the other side of Bahramabad to this point the whole country is regularly seamed with lines of kanāts; nowhere have I seen them in such numbers. The amount of work and money they represent is really enormous; all come from the western hills, none are to be seen on the side of the eastern range.

At 12 miles passed an ābāmbār (covered water tank), with good water.

From here to Kabutar Khan, the road is carried over the same uninteresting sandy plain.

Kabutar Khan, 23 miles. Total, 166 miles. I was put in a very nice house, a sort of shooting lodge, of the prince's, with a large garden attached.

The Chapar Khāneh and caravanserai were good.

Kabutar Khan belongs to the State; 112,500 māns (1,462,500 lbs.) of grain paid as rental; water is got from the river Lalahzar; 200 houses, 900 population; 70 oxen; 12,000 māns (156,000 lbs.) of grain sown yearly. In the 24 hours 50 jereebes are watered. The women are employed in weaving a sort of cotton cloth used in the house.

November 16. The road still crosses the same class of plain until at the 4th mile it comes to an ābāmbār, whence the road passes over a kavir (salt desert), the ground being very light in colour, but hard. This, I am told, after heavy rains, is very bad going, sticky, and soft.

Arrived at 12th mile at Robat. There is a quantity of cultivation around the village, which has a fine caravanserai, and a large, well-built ābāmbār. Cotton and castor oil crops are mixed, and still standing; both have been very good this year.

From Robat the road to Baghin is good, slightly down hill though somewhat stony. The village of Baghin was reached at 28th mile. Total, 194 miles.

We put up in another shooting box of the prince's, even better than that at Kabutar Khan. The village is large, and has a good caravanserai; a little distance away from it is the chapar khāneh. The ground is well cultivated all around. The young crops are showing up well; there is plenty of good water from the hills.

Robat belongs to Seyyuds; 50 tumans taxes. Water from kanāt. In 24 hours 30 jereebis are watered; 10,000 mans (130,000 lbs.) of grain are sown yearly; 150 houses; 700 population.

Baghin belongs to the State; it pays as rental 7,000 māns (91,000 lbs.). Water derived from springs in the hills; it has 400 houses, with 2,000 population; 30 jereebis are watered in 24 hours; 1,000 māns (13,000 lbs.) of grain sown yearly.

November 17. From Baghin the road at first, for some 2 miles, descends, and then gradually ascends, passing over the outer slopes of the southernmost points of the range which divides the two roads from Yezd to Kerman; it then descends quietly towards Kerman, which lies, so to speak, at the apex of the angle formed by these two valleys, and here terminates.

At the 15th mile (total 209 miles) the town of Kerman was reached.

Some 3 miles before entering the town I was met by a large concourse of horsemen, headed by one of the chief khans of Kerman, and also by the chief of the Afshary tribe, and the Nasr-i-Lashkar. At the town gates a number of Ferashes met me, and conducted me to the Bagh-i-Nasireh, where I was put up in a handsome pavilion. The Prince Governor has his lodgings in the same garden.

The garden is situated at the westernmost end of the town, and is part of the ark or citadel.

KERMAN.

Kerman has but little of interest in it. The town of Kerman having no public buildings of prominence or beauty, the only exception being the Kabba-i-Sabz, which lifts its head above the mounds of mud which cover the habitations of the people.

The present town is comparatively new, having been built by

Fath Aly Shah. The old town was destroyed by Agha Mohammed Khan, the founder of the Kajar dynasty, after his defeat of Lutfali Khan in 1795, when he committed various atrocities, and caused the place to be razed to the ground.

The present town lies somewhat to the north-west of the old one. It is surrounded by a rampart and dry ditch, and has 6 gates. A fair portion of the habitations are now outside of the walls to the eastward and are situated between it and the Kal'ah-i-Dukhtar.

The Kal'ah-i-Dukhtar or Kal'ah-i-Ardashir, as it is variously called, is now almost entirely in ruins. It was built on two outlying limestone hills, spurs of the mountains to the east. This Kal'ah is attributed by local tradition to Ardashir Babagan, but nothing authentic can be learnt about it. That it is very old is proved by such of the bricks as are to be seen. They are enormous, and closely resemble those found at Shahpūr near Kazerun.

The two hills were brought into one fortress by a wall which surrounded them, and which encloses a large quantity of ground.

Inside this surrounding wall are various small mounds, old kanats, &c. The mounds in all probability cover the remains of the old capital, of which these forts were the citadel or Acropolis.

The bazaars are well-built, straight, high, fairly broad, and commodious; the main one running right through the centre of the town nearly due east and west. There are several well-built caravanserais branching off from the main bazaar, the best of which together with this bazaar, were built some years ago by the late Governor, the Wakil ul Mulk, who did an immense amount of good in the province over which he had control for many years, first as Vizier and then as Governor.

Kerman, during the last thirty years has practically had but three Governors who have been able to carry out a policy of public works which has conduced to produce a state of affairs unknown elsewhere.

The place is at present quiet and peaceful, in good order, and the people are contented.

The buildings are all in good repair and well looked after. Unhappily the town is very poor: there are no wealthy men in it, belonging either to the upper or to the mercantile classes. It lies somewhat aside from the main trade routes and reaps but little benefit from them.

The present Governor-General, a cousin of the Shah's, has been in power only a few months, having succeeded his brother, the late Firman Firma, in the summer. The latter was a strict firm Governor, hardworking and very just; he has left the name behind him of a capable and upright man.

The present Governor-General, who has been granted the title of Firman Firma, promises well and is conscientiously trying to follow in his brother's footsteps.

He is a keen man of business, and always to be seen at any time during five days a week by the humblest of his subjects. During most of the day he sits in open durbar, where all may come to see and bring their complaints before him.

He is young, enlightened and very enthusiastic, anxious to make his mark in the world. In Tehran he studied in the college, and there learnt French, which he speaks fairly well. He is desirous of improving the condition of his province, and would gladly help in any way possible to open it up to trade, to better its means of communication, and to develop its resources.

It is said that in the various mountains about Kerman there are abundance of minerals and coal. On the mountain side there are vast flocks of the celebrated Kerman goats and sheep, whose wool, except such as is locally used, is exported to India and Russia.

It appears to me that it would be very easy for him to gratify his aspiration, but to get any foreigner to undertake speculative work in this province, in view of the ever changing politics of the country, where a man is governor to-day and out to-morrow, would be difficult.* Were, however, a concession to be granted by the Shah to create, establish, and work a small cloth factory, I feel confident it would prove a lucrative undertaking very quickly, and if proper work were done, the stuff turned out would very soon oust out of the markets of Persia the cheap and common cloths which are now used. The quality of the cloth that could be made with such resources should be vastly better than the present imported material, and which it could undersell at a remunerative profit.

The surroundings of Kerman are different to any town I have seen in Persia; there are no gardens outside of the town, but cultivation is carried right up to the edge of the ditch.

To the south, south-east, and south-west, it is practically enveloped by very bold limestone hills, some of the distant ones to the south-west reaching to 15,000 feet above the sea, only exceeded in Persia by such peaks as Demavend, near Tehran, and those of the Dinar Range, in Fars.

The climate was described to me as being singularly good and healthy. There is no fever, and no excessive heat or cold.

The height of the place, and its being open to the north, will account for the former; its southern position, and being near the desert, would account for the latter. It is, however, an idiosyncrasy of the Persian to praise the climate of his town, and claim for it a pre-eminence over all others. Judging from the various plants, &c., I saw in the place, I should say that there was but little difference between it and Shiraz.

In the valleys of the hills in the immediate neighbourhood of the town there are numerous villages with gardens, which form beautiful summer quarters, and which supply the place with good fruit nearly all the year round.

The water supply is chiefly from kanāts, but every house has its well, the water level some 50 feet below the ground; it is good and pure, with no sign of brackishness.

In the ark there are three water-wheels of a very primitive description for supplying the various tanks and gardens of the palace.

* Since writing the above the Firman Firma has been removed from Kerman to Tabriz to act as Vizier to the Valfahd.

The wheels are heavy wooden ones, with wooden pegs similar to tent pegs, driven into the periphery of the wheel which act as cogs. Earthenware bowls are fastened to two parallel ropes hanging over drums fixed at the top and bottom of the well; they empty themselves into a receptacle in the centre of the upper drum; the water is thence carried away by delivery pipes.

The wheel is driven by a bullock yoked to a long spindle attached to the smaller wheel. He is blindfolded, and quietly goes on walking round and round the house which contains this cumbersome appliance all day long, pulling up the charged jars. The waste of power and of water is enormous, a simple chain pump would deliver at least five times the amount of water, but this wasteful and unscientific appliance completely satisfies the wants of the easily-pleased Persian.

Kerman Industries.

The chief industries of the place are the weaving of "*Shal*" and of carpets, and the making of namads. In all these industries the chief ingredient is wool.

The "*Shal*" is a woollen cloth which is made up into lengths of from 3 to 5 yards, with a width of about 42 inches, of various tints and thicknesses. It is used for coats and cloaks, and costs about from 20 krans to 50 krans apiece. Better qualities are embroidered in various designs and colours and form very lovely articles, being used for curtains, coverlets, table-cloths, and wrappers. This is known as *Tirmah*. A further development comes out in the shape of the shawl, which is so widely renowned, and is only surpassed by the celebrated ones of Cashmere. These shawls are made in special-built rooms—low, dark, and without ventilation. A room will contain some four to ten looms, according to its capacity. I saw one of 28 feet by 14 feet, in which were eight looms all in work. The length of a shawl is about 10 feet 6 inches by 3 feet 6 inches in width. The loom is perpendicular, and the pattern side is away from the workpeople, of whom three are employed on each shawl, the one in the centre directing the others what colours to work in from memory. The procedure generally in making shawls and carpets is very similar, except that in the shawl the ends of the wool are not cut off but are turned in, and remain to be carried on.

Shawls are made varying in price from 30 krans to 1,000 krans; the latter are almost entirely taken up by the Government and rich natives, whilst the cheaper ones go to the various towns in Persia; the largest demand comes from Constantinople, for which place special shapes and designs are worked. A small quantity also find their way into Russia and the Khanates.

In Persia the carpets of Kerman have even a higher name than the shawls, and are more esteemed than any other carpets made in the country. They are celebrated for the closeness of their weaving, excellence of design, old patterns being almost

generally adhered to, and the purity and fastness of the colours. As a rule they are made small, generally about $6\frac{1}{2}$ feet by 4 feet. Larger kinds can be made, but they are very expensive: a very ordinary carpet of the above size will cost about 4*l.*, but really good ones run up to some 75*l.* the pair. They are generally so made and sold. I saw one pair of carpets in process of weaving, which I was told when finished would be worth 100*l.*

The Prince has set up carpet weaving on his own account. They were making carpets with designs after some of the processions in the Hall of One Hundred Columns at Persepolis.

In the town of Kerman there are six master carpet weavers of repute who have between them about fifty looms, but dotted about the town are solitary looms, making a total of something like 100 in the place.

The number of operatives is regulated according to the width of the carpet, one being stationed at every half yard (Persian yard = 21 inches). In the centre is the director, or khalifah (bishop), as he is called. The khalifah is generally a grown-up man, or a lad of some 16 years of age, whilst the operatives are but children varying in age from 4 to 14.

The khalifah gets 10 shahies a-day, the children 10 krans for first year, 2 tumans second year, and 3 tumans third year, and so on till they are capable of becoming khalifahs.

The pattern or design of the carpet is drawn out in colours on sectional paper, and the colours and numbers of stitches of each colour are called out by the khalifah to the operatives from it.

The looms in Kerman are placed up and down or perpendicular, whilst in the districts and among the nomads, they are placed horizontally. The work is commenced at the bottom and as the carpet is woven it is wound gradually over the lower beam and the work is thus kept always at about the same level. These carpets are generally woven square, whilst in the districts, owing apparently to their using the horizontal method, the cotton threads of the warp are not held at a sufficient tension and therefore the carpet comes out irregular in shape.

The warp of these carpets is made of cotton twist, which is imported either from England or Bombay. The woof is made from the wool or kurk of the Kerman sheep or goat, and dyed by the weavers themselves. Should, however, a silk carpet be made both warp and woof are of silk.

This kurk is a speciality of Kerman. It is the under wool of the young animal which is shorn in the early spring. If left too late it casts its wool and it becomes coarse and valueless.

The hair of the goat and wool of the sheep are used separately, never if possible are they used together in making the same carpet.

Carpets and rugs also are woven in Iktag and among the Afshar nomads, but they are not of much account, being small and usually of the pine pattern. The Afsharys also make a rug of all wool like the nomads of Fars and Khorassan, but not nearly of so high a class, while in Rawar carpets equally good but not of the

same fine quality as the Kerman ones are woven; and are chiefly exported.

Beautiful silk rugs are also woven on demand, but as they are so very dear they are not much sought after. In fact there is but little trade at present in any of the Kerman carpets; some few are taken to India and sold to the chief people in Bombay and the Punjāb. The main trade is done in Kerman itself, where the better sorts only are made. They are taken by the Governor and are sent as presents to the Shah, the Sadrazam, and other notables and friends. Some are bought by Turks for export to Constantinople. None are made on speculation. A carpet is never taken in hand until an advance is received.

I am quite sure that it would not be difficult to develop this trade in Kerman in the same way as has been done in Irak. A little quiet persistence and patience would overcome all obstacles. Everything is ripe for it, a kind and friendly Governor anxious to see things progress, a poor district, waiting to be helped. I imagine that an honest trial to improve this trade in Kerman would have a very cordial welcome from all classes.

Doubtless it would entail some little expense and require a man not easily discouraged to undertake the work as there is always a large element of *vis inertiae* and obstructive resistance to change to be overcome in the Persian mind, but what has been done in one place can be done in another.

One obvious advantage it has over Sultanabad is its proximity to a sea port, thus obviating all the disagreeables and delays of a long land transit.

Namada.

The last industry mentioned above is that of making namads or felts. These are made in several places, but those of Kerman are most esteemed. They are beautifully soft and yet wear well. As a rule they have a pretty carpet design in them, in various colours, which is most effective. In other places the design is only in white and red.

The size of the namad or felt being determined, a piece of matting somewhat larger is taken and on it are placed according to the ideas of the workman small pieces of coloured wool which although apparently placed without method yet at the end develop into a pretty and graceful design. Over this is laid a piece of thin fine felt. The matting and felt are then well saturated with a strong soap lather. They are then tightly rolled up together and with alternative pressure from his elbows and knees the roll is well worked by the man until the design, which in the process loses none of its form or crispness of outline is thoroughly pressed into and consolidated with the felt. This again is placed over another piece of felt, rolled up with it, served with soap lather and treated as above, and so on till the required thickness of felt is obtained. A good felt will take 5 days to make, and if about 10 x 5 feet can be bought for 2*l*.

Although I have said that these are the main industries of Kerman, yet they are not peculiar to that town but are general to the villages of the district. Indeed Zarand, a village about 80

miles to the north-west of Kerman has the reputation of making the best felts in Persia.

There is a small but important colony of British Indian subjects settled in Kerman. The main external trade of the place is in their hands. British Indian subjects.

They come chiefly from Shikarpore, seventeen of them came and paid me a visit. They tell me, however, that they number in all 25 heads of families. They have correspondents in Scinde, Panjāb, and Bombay, with which places they do an import and export trade. They also have friends, correspondents, and agents all over the Province of Kerman, even extending to the confines of English Beluchistan. In all, they are about 300 merchants.

They complain somewhat bitterly of the manner in which they are neglected and allowed to take care of themselves in these out-of-the-way places. They are very urgent that a Consular Officer should be appointed to Kerman, who would be able to support them in their just demands and help them against unjust attacks, and such petty persecutions as an alien race is always subjected to in an Oriental country, where he has no official representative. They cited as pertinent to this point the way they were imposed upon as regards the customs dues.

As British subjects they are entitled to export and import their goods at 5 per cent. *ad valorem* duty. The custom authorities ignored this and made them pay as Persians. They would not accept the custom permits of the port of entry (Bunder Abbas) which showed that the regulation 5 per cent. had been paid, nor would they, on export goods, allow the duty to be paid at Bunder Abbas, or give the necessary receipts showing what duty had been paid; thus they had to pay at Bunder Abbas the regulation 5 per cent., plus some 3 to 5 per cent. more at Kerman. Consequently in the long run they paid duty at an average of from 8 to 10 per cent. on all their imports and exports. In this they were worse off than their Persian competitors, but they claimed their treaty rights as British Indian subjects.

The Indians I had seen at Bahramabad made identically the same complaint.

On investigation, I found that their statements were true and that they were so treated. On my representing the matter to the Prince-Governor and showing him that it was so, he was good enough to order at once that the matter should be put right, and I was able to see, before leaving Kerman, that his orders were carried out. Thus this one question was satisfactorily settled for the time, but on any change of Governors it is sure to crop up again, and our Indian subjects will again be imposed upon.

Another point where a Consular Officer would help them and help trade would be in preventing their being defrauded of their just debts, as is now often the case. They, however, are somewhat inclined to ignore the old aphorism that high interest means bad security, and consequently are bound sometimes to suffer loss. On this point the Prince rather complained about them. They lent money to people who had not a kran, and then they expected that

he should get it back for them. "I cannot get something out of nothing," said he.

Some of the people had been in Kerman for 30 years—all had been over 10 years, and it was self-evident that, on the whole, they had done well and prospered.

They have adopted a semi sort of Persian dress, whilst keeping their own caste marks. They wear a very tall, ugly lambskin hat of the type of some 60 years ago, and a large cloth cloak with long arms falling nearly to the ground.

They occupy a caravanserai to themselves off the chief bazaar. Although they speak Persian to a certain extent, yet it is but sufficient to carry on their business; none can read or write it.

Zoroastrians.

The Parsees of Kerman are not such an important part of the population as they are in Yezd. They are not so well off. They cannot trade in the same way, but are rather pedlars than merchants. In some ways they take the place of the Jews of the latter place without having their degrading duties, but in other ways they are better off. They are not persecuted or molested by the Persians.

Of the Persians who drink spirituous liquors there are very few.

In Kerman there are some 1,700 Zoroastrians, and about 300 in the villages. They have established a council as in Yezd; it consists of 12 members and it acts in every way as that of Yezd, as previously described.

There are three schools, containing only 75 pupils. There are no girls' schools, one was started and 15 girls offered themselves; the opposition to this innovation was, however, too strong and the idea had to be abandoned. It was too radical a change for such a conservative body as the Parsee of Kerman.

They live in a quarter of their own outside the walls of the town to the north-east. There is nothing like the same cleanliness and order shown here as at Yezd, nor are the people so cleanly in their persons, or so well dressed. On the whole, the Zoroastrian of Kerman is not nearly such a good type as his neighbour of Yezd.

Carriage.

The chief means of carriage in this province is the camel. They are bred in Beluchistan and brought up to Kerman. Some few mules are bred in the hills about Kerman. Donkeys are numerous all over the place.

The late Firman Firma used to try and improve the breed of horses by the importation of stallions from Fars and Arabia, but as the mares were not of any class he was not successful. In a small way the present Governor is following in his brother's footsteps, and it would appear he has a better prospect of success for he not only gets stallions but good mares, so that in time, with judicious treatment, it is possible that he may produce a good animal, a result very much to be desired, as the good old breed of horses which was to be found in Fars has now nearly died out owing to a variety of causes.

The Afshary nomads breed a good useful sort of horse, short

backed and cobby looking, with good bone and nice flat legs, having peculiarly short cannon bone, but with a short thick neck and a common head; height about 14 hands. By careful breeding, a more than useful animal might be cultivated from the numerous mares of this tribe.

These nomads, are an offshoot of the great Afshary tribe, who are located about Irak and Khorassan, were brought over into the Kerman territory by Agha Mohammed Shah, and settled there; they now number some 1,000 tents and are a very useful auxiliary force to the Government of Kerman. They are quiet, subordinate, and plucky.

Kerman suffered somewhat heavily from the depredations of the two outlaws in Fars, Reza Khan (Arab) and Houssein Khan (Baharlu). They came into Kerman territory once, but were driven out again with loss. Along the frontier the Firman Firma had some 7,000 men posted to prevent these outlaws again breaking out of Fars. In consequence they settled down somewhere about Bunder Abbas, looting the villages, and keeping the whole place in a ferment, so that there was practically no traffic between Bunder Abbas and Kerman. Thus the trade of the place suffered very much, and this it could ill afford, since it is but a poor one, as previously stated. There is not a merchant in it worth 10,000 tumans. Kerman pays only 24,000 tumans customs duties, and 300,000 tumans revenue to Tehran yearly.

The people are everywhere very nice, polite, quiet, and generally well behaved; their poverty, however, is appalling. Never in any place in Persia have I seen such a number of beggars; the place teems with them. People of Kerman.

The dress of the women in Kerman differs vastly from the rest of Persia; they, when out of doors, dress entirely in white, chadar and chalwars (cloak and trousers). The effect when a number of them are seen together is most curious, and in the twilight somewhat ghostly. Women's dress.

The troops now in Kerman are but few, only sufficient for the necessary duties of the place, every available man having been sent to the frontier; but such as were in the place were well dressed, well set up, and generally smart. They, in fact, showed by their bearing that their chief took an interest in them, and that they were not the common ragged tailed objects generally to be seen in the out-of-the-way towns of Persia. Troops.

The trade of Kerman with places outside of Persia is but small, the people cannot afford to buy much. Such as it is, is chiefly with Bombay, and it is in the hands of the British Indian subjects established in the province. Trade.

A few bales of British prints are sent from Yezd to Kerman.

Russian piece goods rarely find their way here. I saw none whatever in the bazaars. A few things such as semovars, a little cutlery and glass filter down through the hands of native merchants, but the main supply of the latter articles is derived from Bombay. It may be taken that Russian goods are entirely excluded from this market.

There is little or no traffic direct with Mashhad; it all passes through Yezd.

With Afghanistan the samerea sons as those given in the report regarding Yezd trade prevail here.

No doubt a development of the carpet trade would effect a change in the Manchester print goods market, and Kerman might become a centre of trade which at the present time it can scarcely lay a claim to.

Roads.

Kerman in these times has not such importance as a centre from which various roads radiate as it used to have; the exigencies of an increasing commerce in the north has caused charvadars (muleteers) to use shorter and easier roads, consequently it has been somewhat left out in the cold.

There are two main roads to the seaport of Bunder Abbas. The one *viâ* Deh Bakri and Jeruft, the other *viâ* Sirjan, Saidabad, and Ahmedi. To Bām and Bāmpur the first road is followed to Sarbistan, thence to Bām, and *viâ* Narmishir to Bāmpur.

To Shiraz there are two roads, one *viâ* Sirjan and Niris, the second as hereinafter described.

To Yezd there are also two roads, *vide* report on Yezd.

To Khorassan the road goes *viâ* Birjend and Kain; this road is, however, not much used, travellers prefer going *viâ* Yezd, and merchants send their goods also that way.

From Bunder Abbas to Mashhad there is a route which camel-men prefer to use in all seasons except winter, when grazing is scarce. They either go *viâ* Saidabad to Dafr *viâ* Deh Shuteran, or to Bahramabad *viâ* Chasmeh Shur. The two routes join somewhere about Jellalabad, into one road which crosses the Lut desert, and cuts in at Tabbas. This road is said to be some 200 miles shorter than any other. Forage is plentiful, and it is said to be perfectly safe.

Carriage.

The price of carriage varies very considerably during the year:—

Route	Per 650 lbs	
	From	To
	Krans.	Krans.
Bunder Abbas to Kerman	40	110
Kerman to Bunder Abbas	30	80
" Mashhad	80	120
" Yezd	50	70
Yezd to Kerman	35	50

It will thus be seen that carriage from north to south is always cheaper than from south to north.

Kerman to Shiraz.

On November 21 I took leave of the Prince at 1.30 p.m., and left for Baghin in one of his carriages. I was taken on to Bahramabad in the same manner as I was brought into Kerman.

I arrived there on the 23rd at 11.30 a.m., and immediately paid a round of farewell visits. I saw the Indians there, and settled their affairs as well as was possible; also saw some of the Parsees.

On November 24, at 8 a.m., I left for Pa'Kalah, taking leave of Mirza Aly Naki Khan and other notables. I was escorted by Aly Agha, the Prince's man, and 10 sowars, the Prince's orders being to take me with safety outside his jurisdiction.

The road leading due west passed through a great extent of cultivation, and by many kanāts. At 9 passed in succession the villages of Khungur, Mehdyabad, Shumehabad, and Kasimabad. At 8.10 a.m. arrived at Rustamabad, the last village on the plain before reaching the hills. Dafr being visible to the north, on the hill slope.

Rustamabad belongs to Mohammud 'Jafar Herendi. It is watered by kanāt, and 10 jereeb are watered in 24 hours. 1,000 māns (13,000 lbs.) of grain are sown yearly; 40 houses; 106 population; taxes, 5 tumans. It has only been made in last 20 years.

At 11.15 a.m. left after breakfasting.

The road led up a gentle ascent to the hills. At 12.55 p.m. (17 miles) came to a ruined caravanserai. Just beyond it the road bifurcated; that to the left went to Deh Shuturan; we passed some caravans which had come by this road from Niris. At 1.37 p.m. (20 miles) we entered the hills, and immediately after we crossed a road, which comes from Khush Kuh, and goes to Sirjan; 6 minutes after we came to a deep river bed, with a mere trifle of water in it; what there was, however, was sweet and good. Large numbers of gez trees lined the edges of this river bed. In spring there must be a good flow of water, but where it goes to, or what becomes of it, I could not learn. I passed no river bed on the road from Yezd to Bahramabad, which could account for it. The road then led up through the hills, following the line of the river, generally over slopes and along hillsides, till at 3.25 p.m. (28 miles; barometer, 23'65) we came to the head of the pass, which is known as Darn-i-Changur.

The country to the south was one mass of small hillocks or rolling ground, the result of the scouring of the main hills. To the south-west was a large open plain on the western edge of which I am told is Deh Shuteran. To the north only an intricate mass of small hills was to be seen. Forward the view is obstructed by the Pa'Kal'ah hills. After passing this point the road gradually descended and passed through some very wild country; a fair quantity of scrub on the hill sides and now and again a stunted terebenth tree (wild pistachio) was to be seen. After going 32 miles we came to rolling ground somewhat resembling the southern downs. At bottom of each roll there was a small stream, sometimes with flowing water, at other times dry, all going into the main stream above referred to. At 5.45 p.m. (38 miles) we came out on to a small

plain surrounded by hills, here there was good cultivation with two or three small villages dotted about. At 6.30 p.m. (41 miles) we came to Pā'Kalāh.

This village is built almost at the extreme northern end of the valley which is about 4 miles long by $\frac{1}{4}$ mile broad. Above the valley on some rocky low hills is a large round watch tower. The hill known as Pā'Kal'ah completely envelopes and dominates it on the western side.

Pā'Kal'ah is in the Yezd province and under Zabet of Shahr-i-Babek. It belongs to peasant proprietors. It has 3 kanāts, also water supply from river, 5,760 jereeb of ground under cultivation, 1,000 oxen and donkeys, 500 sheep, 700 tumans taxes paid yearly, 150 houses, population 600.

November 25. 6.30 a.m. Barometer 23.25; temperature, 38°. Left at 7.30. The road after leaving the village crossed a small stream and went up the valley through cultivated ground for a short distance then turned into the hills west-south-west, after twisting and turning about following a small gorge between two spurs of the Pā'Kal'ah hills it led up a steep rocky pass, the stones and out crop here being almost entirely granite. We reached the top of the pass at 8.30 (3 miles); barometer, 22.45. The pass is known as Godar Gilāb, thence the road, a fairly good one, led down to the westward by an easy decline, and wound round the spurs of the hills which were well clad with almond and terebenth trees. At 9 a.m., or 5 miles, we got out of the hills, Gilāb south, about 6 miles off, and passed a small outlying piece of cultivation belonging to Gilāb. At 10.20 a.m., or 10 miles, we came to a fine mountain stream with orchids and fields on each side of it, this belongs to Mimānd. The village of Mimānd was seen up in a gorge of the hills, about 3 miles to north-east, gardens lining the stream the whole way to it.

Crossing the stream the road led over a great deal of broken rough and stony ground, passing several small streams, all flowing into the first one. At 14 miles got out of the hills altogether. Then it led across and down the hill slope direct for Shahr-i-Babek which could be seen in the distance some 15 miles away.

The plain was covered with scrub, terebenth trees and thorns.

At 17 miles came to an ābambar which contained good water, this I was told was on the camel track from Sirjan to Yezd. Directly afterwards passed a deep river bed with a little water in it, so passing across the plain which had nothing to recommend it till at 4.55 p.m., 32 miles got to Shahr-i-Babek.

Shahr-i-Babek consists of a conglomeration of three villages, all more or less in ruins. The streets such as they are, are filthy, and the walls broken down, everything seems to be in a gradual state of disintegration. There is a small covered bazaar and a tumbled down caravanserai. The Khans place is from a distance somewhat imposing, but when viewed from near is simply a mass of ruins.

The place is said, in ancient times, to have been one of prominence and importance, but there is nothing now to show that. There are not even any mounds of sufficient size to bear out the statements.

Some 30 years ago Pa'Kal'ah, Shahr-i-Babek, and the adjacent villages belonged to the Government of Kerman, but they were then handed over to that of Yezd to enhance the value of that province.

Shahr-i-Babek and the district joined to it pays 10,000 tumans taxes. It has 1,300 houses, 10,300 population. There is a small bazaar of about 80 shops in which a certain amount of business is done for the surrounding districts. The principal cultivation is grain and cotton.

November 26. I left Shahr-i-Babek at 7 a.m., the road leading through a small amount of cultivation, to the side of low round hills, and then across, due west, a dreary plain with nothing but a sprinkling of camel thorn and low scrub. At 3 miles we passed a small stream. At 17 miles the road divided, that to the right going to Manzilabad. At 21 miles we arrived at Robat-i-Seyyud, a fairly compact prosperous village mainly owned by Seyyuds. The people were somewhat rude and objectionable. I could not get a house so had to tent in a small walled piece of ground.

Robat-i-Seyyud, under the Zabet of Shahr-i-Babek, belongs to peasant proprietors. It has 192 jereeb of cultivated ground; 960 māns (12,480 lbs.) grain sown yearly; 2 kanāts; tax on sheep, &c., here equal to 300 tumans; 400 tumans taxes also paid on ground; 170 houses; 900 population.

November 27, at 6 a.m. Barometer, 24.40; temperature, 40°.

Left at 7 a.m. The road passed by the village of Housseinabad, 1 mile, then Ferozabad, 2 miles; after $3\frac{1}{2}$ miles, Manzilabad; and at 4 miles, Nusretabad; at 5 miles, Kanūn. It then came out on a sort of swamp, with some gez (tamarisk) trees dotted about. At 8 miles came to some mounds with trees, and a spring known as Feda: this is said to be a great haunt of thieves, who make their excursions from it all around, using it as their headquarters. The whole of this neighbourhood has a most evil reputation. At 10 miles, we passed through a small, but very salt stream, running north to south. The local geographer says that it comes from Ispahan. It is possible that it may be a continuation of the Zanderud after leaving the Gāv Khaneh, but I could not see any possible exit from that place when I examined it. To the north, as far as I could see, the country was all plain, no hills of any kind appeared. In the south of Persia salt streams are of continual occurrence.

At 13 miles, passed the bed of another salt stream. At 17 miles, the road bifurcated; that to the right leading to Fathabad.

At 25 miles arrived at Tajabad, the chief village of the district of Herat-i-Karreh. This village and district are situated on the eastern slopes of the outlying spurs of the Fars hills. It originally belonged to Fars, but for some reasons such as those given above it was handed over to Yezd. The people are all distinctly Farsian—in face, ways, and ideas; they regret and resent the change. Tajabad is a well-constructed and apparently prosperous village, with some good buildings, especially the house, or kalah, of the Zabet or local Governor, which is large, and is almost a fort. There is plenty of water, and a fair quantity of ground under cultivation.

The Zabet was good enough to put me up, and treated me with every kindness and consideration.

Herat-i-Karreh is the name of the district ; 8,000 tumans taxes are collected yearly. Tajabad has 192 jereebis under cultivation water is supplied by 1 kanāt ; 500 houses ; 2,700 population ; 1,000 sheep.

Women are employed in making ghileems (cotton carpets) and juls (covering for horses). 1,920 māns (25,960 lbs.) of grain are sown yearly.

November 27, at 6.30 a.m. Barometer, 24.55 ; temperature, 40°.

Left at 7.30 a.m. The road went through the village and out to the south, leading across to a point of the hills south south-west. There is a pass through the hills immediately behind the village, but not practicable for animals. At 3½ miles we came to this point. The road to Niris here branched off to south, ours going forward, south south-west, across the slope of the hills, till at 7 miles it crossed a small pass over some low hills, then led across a small plain encircled by low hills, till at 11 miles the hills were reached ; and crossed by a short, but very abrupt, little pass, called Logangir. From the foot of this pass the road bore across a plain, taking a due westerly direction. At 16 miles, crossed another small pass called Godar-i-Khonsar, which brought us out on to the Khonsar plain. The whole of this plain was under cultivation. It had in it some fine large gardens and orchards. The village, which was reached at 19 miles, consists of a large number of huts congregated round a kalah or fort. It is apparently a well-doing, prosperous village, with good population. On seeing us all, the people took refuge in the fort, the walls of which were lined by well-armed men.

After leaving the village we passed over the hills at the back of it, and at 22 miles came down on to the banks of a stream, which ran along the northern side of a narrow deep valley, passing round the western end of the village of Khonsar, and watering the whole of that valley. At the end of the valley, 24 miles, came to the kalah of Borasjoon. Leaving this on the left and crossing some low hills, at 26th mile, came to the valley of Sarchiān. At 28th mile, passed the kalah of Nao Band, Kasimabad on the right, in a bay of the Roshan Kuh. At 30th mile, passed the village of Bebilun ; this was also in a bay of the same hills, which here are very fine, steep, and well wooded. At 31½ miles, we arrived at the Kal'ah of Aliabad ; Ziarat being seen under hills to south-west. This Kal'ah is quite new, contains a number of rooms and open spaces, where are pitched black tents. A good stream follows the road all the way from the last place. The general view here is more picturesque than anything yet experienced. The latter part of the journey had been made in heavy rain, which continued the whole night.

Sarchian, which is under the Shiraz Government, is watered by kanāts and the river ; 20 jereebis are watered in 24 hours ; 3,000 māns (39,000 lbs.) grain yearly sown ; 3,500 tumans are taxes of the whole district. It has two walled villages ; 50 houses ; and 240 population.

November 28. Barometer, 23.30 ; temperature, 40°.

Left at 8.45 a.m. ; it rained up to 6 a.m. The road took a south-westerly direction, heading for the hills. We passed by the village

of Ziarat at $1\frac{1}{2}$ miles, and the river of Bebilun at 2 miles, and the village of that name at the 3rd mile. The road then bore up to the west along the slopes of the Roshan Kuh (Roshan in Persian means "light." These hills are called by this name, as they are said, on a clear dark night, to give out a glow). At the 4th mile, we passed on the right a village among some low hills, called Shah Abdul Kazim. The hills here are all covered with a jungle of almond and thorn; they are somewhat precipitous. At the 5th mile, we came on to the outer slopes of the Sufid Kuh, which is a very prominent hill standing out of the main range. Road continues due west. At 9th mile, came to the head of the pass, which is known as Godar-i-Sufid. Here the hill is all covered with well-grown trees of wild pistachio, almond, and olive. The road then descends, and comes out on a small plain, which has patches of the same sort of jungle. The road follows the side of the Sufid Kuh, winding up and down and in and out of the trees. The plain of Arsinjan is seen to the north in the openings of the hills. At $10\frac{1}{2}$ miles, we arrived at head of the pass of Godar-i-Sufid Khawaja Jamāli. The road now trends to south; at the head of the pass the lake of Niris is to be seen through the openings of the hills, a fine body of water intensely blue. The pass runs between the spurs of the Sufid Kuh and the Kuh-i-Khan, winding in and out and up and down. This pass is one of the most picturesque and romantic bits of country I have seen in Persia. The dying grasses and reeds are all pure gold in colour, the leaves of the wild pistachio, a red bronze; the decaying ground plants have various tinges of gold and brown, according as there is sunshine or not. Above, and at each side, are the precipitous cliffs of the towering hills, with their tops capped with clouds; in the middle distance are the gradually-descending spurs of these hills, and in the far distance the lake, with its numerous rocky islets enveloped by other hills of great height, which are clearly reflected in its blue waters, the whole making a picture difficult to equal.

At the 12th mile, the road bends to the south-east, making direct on the village of Khawaja Jamāli, or as it is called in the maps Kawam Ali, which lies in a valley on the southern slopes of the Roshan Kuh, facing the lake. Nearly opposite this point the lake is very narrow, and up to the first rains was to be crossed on foot.

At 14 miles, we passed an Imamzadeh, which was almost enveloped in the branches of a fine fir tree, and at $14\frac{1}{2}$ miles, arrive at the kal'ah of the village, where I was put up by the kalunter, or chief.

The village is in a very distressed condition; the whole of the district having been quite devastated by locusts. From a sowing of 40,000 lbs. weight of grain nothing was garnered. Grain has to be brought from neighbouring districts which have not suffered to the same extent. It is eked out by mixing barley, maize, and millet before being made into bread.

On the hill sides above the village are a number of grape gardens; around it are some very fine orchards. The water supply is derived from a copious spring, which bursts from the hill side close to the Imamzadeh above referred to.

Khawaja Jamāli belongs to the Hakim Bashi, of Shiraz. It is

the head of a district, which pays 8,000 tumans taxes yearly, minus 1,000 tumans the pay of the Zabet. One kanāt which waters 40 jereeb in 24 hours; 200 māns (2,600 lbs.) grain sown yearly. It has besides 1,000 jereeb of garden; 1,000 houses; and 4,500 population.

November 29. It rained continuously all night, and continued all day, so I was compelled to halt. Barometer, 23.65; temperature, 43°.

November 30. Barometer, 25.625; temperature, 35°. Fine.

We left Khawaja Jamāli at 7 a.m. The road passed out of the village south-west and then bore across some cultivated ground and a spur of a hill. At 3 miles joined the road which comes from Sarchiān through the pass. At 4 miles we got into a pass between two of the spurs of Kuh-i-Khan called Godar-i-Abadeh. At the 5th mile we got out into the plain, a gentle slope down to the side of the lake, and at the 6th mile passed a series of mills fed by waters from a spring. Passed Abadeh Bāla on left road now nearly due west, running parallel to the lake which was about $\frac{1}{2}$ mile off. The ground is covered with a long coarse grass, and in places somewhat boggy. We passed some small clumps of myrtle. At the 14th mile we passed Tasht, which is a cluster of reed huts, built just on the shores of the lake; in a corner, where hills come down to the waters over the village, there is a ruined watch tower built on a peak of one of the hills.

After leaving Tasht, the road, still keeping the same bearing, entered the hills; it was somewhat rough and very up and down. At the 18th mile passed over the Gardeneh Kuchizun, thence for 10 miles the road led in and out of hills, along beds of streams, and was very bad going until, at the 26th mile, it came out on small plain, at end of which was the seemingly prosperous village of Gumun. Thence the road led again up into the hills by somewhat rough tracts till at 30th mile came to the Gardeneh Chah Abbas Aly. Still continuing among the hills it at last led into a sort of *cañon* and came out in the Jemalabad plain.

At the 37th mile we came to the village Kelatkhawr where, after some difficulty, I managed to induce the chief of the village to let me in and give me quarters. He at first thought we were Government emissaries and would not allow the doors of the Kalah to be opened.

Kelatkhawr, belongs to Agha, Sadr, Muijtahed of Shiraz. Taxes, 40 tumans. A spring waters 20 jereeb in 24 hours; 100 māns (1,300 lbs.) of grain sown yearly; 100 houses; 250 population.

December 1. Left at 6.30 a.m. This village is situated in the district of Arsinjan, nearly at the end of the plain of that name, where it joins on to the plain of Marvdasht. Up the plain to the east were many walled villages to be seen. The going was very bad owing to the late rains, there being no proper roads, while the bypaths were like quagmires. At a mile and a half we passed on right the village of Rafiabad, at 2 miles on same hand, we passed the village of Husseinabad, at 3 miles Kamalabad, and at $3\frac{1}{2}$ miles Salahabad under the hills to the left. At $4\frac{1}{2}$ miles we arrived at the village of Jemalabad. At this place the guide gave out, and with great difficulty another one was got.

From this point I was told there were two roads leading to Persepolis, the one by a valley to the right, the second round the point of the hills, due west, where was situated Kadamgah, my objective in this instance; I therefore sent my caravan by the first road following the second myself.

After leaving the village at $5\frac{1}{4}$ miles we passed village of Jelalabad on the right; at $7\frac{1}{2}$ miles passed Kumri on left and Norer on right, the former being uninhabited. At this point the valley to the right was opened out, and in its mouth were to be seen the villages of Dehnao and Aliabad. (I learnt from my men with my caravan that this valley came out ultimately at Sidun, which used to be a station on the main post road, and that it was practically level and easy going the whole way.)

The western point of this valley forms the boundary between the districts of Marvdasht and Arsinjan. We then passed in succession the villages of Aly Agha Seyyud, Chah and Aliabad.

At 10 miles we passed over a bridge of brick with two arches which spanned the river of Kujuk. This small river is the drainage of the water-shed of the above valley and empties itself into the lake, which is clearly seen about 12 miles off to the right. At $13\frac{1}{2}$ miles we arrived at Kadamgah. From the start up to this point the whole plain was a mass of cultivation and was much intersected by water courses. To the left in the distance were many villages to be seen, but their names could not be learnt.

Kadamgah is a platform cut out of the natural rock: it has two easy flights of steps leading up to it. As far as I could judge it had originally been meant to be used as a place to depict some historical inscription, or bas relief, similar to those at Darab or Shahpūr, but it was found either that the rock was unsuitable or else time had not allowed the idea of its author to be carried out. In front of the platform is a lovely pool of deliciously cool clear water. As Captain Wells, R.E., has already described this place in a communication to the Geographical Society, I need not refer any further to it.

From Kadamgah the road led across a small plain for some 3 miles, and then crossed a spur of the hills by an easy pass; but as at this time a terrific storm of wind and rain came on, all observations were impossible. It then led down into the Marvdasht proper, hugging the hills, in the bays of which wherever there was a spring near, was a wattle and dab village or black tent encampment. At 25 miles we passed the village of Kal'ah Seyyud Aly Naki, at 30 miles the village of Chatak. At 37 miles arrived at the village of Shamsabad-i-Takht. From here as the whole of the journey from Kadamgah to this point had been without a guide, I made for this village to get a man to take me to Kinareh, it being nearly dark, where we arrived at 6.30 p.m. Total distance, 42 miles.

Kinareh is watered by one kanāt and also by water from the river; 45 jereebis are watered in 24 hours; 3,000 māns (39,000 lbs.) grain sown in a year. Kinareh belongs to Imam-i-Juma of Shiraz; 100 tumans taxes; 170 pairs of oxen for tillage, 350 houses, 1,200 population.

December 2. I sent my caravan on to Ispahan and went into Shiraz to get supplies and money.

Shiraz trade.

The general aspect of trade in the Shiraz markets is anything but cheering. The year 1892 opened with the bazaars in a depressed state for all imported or exported goods. Various causes are assigned for this :—Excessive importation, due to keenness of competition ; the fall of the Regie acting on the flow of currency ; scarcity of gold, causing heavy rises in exchange ; ascendancy of the priesthood, their influence bearing against the foreign importer ; depression in foreign markets as regards Persian exports, so that no chance is given to the foreign importer to send his money home at fair rates.

Russia.

In this market the influence of Russia is still unfelt, and the whole of the imports are practically English or Indian. Manchester piece goods, such as grey and white shirtings, prints, Turkey red twills, fancy goods, silk and gold cloths, brocades and lace, gold thread, T-cloths, woollen fabrics, iron, copper, candles, loaf and fine sugar, tea, glassware, coffee, tin, and solder are imported.

The *Exports* are raw cotton, tobacco, gall nuts, assafœtida, some few skins of marten, fox and lamb, gums, raisins, bitter and sweet almonds.

A company under the designation of the Fars Trading Company, Limited, was started about 15 months ago by some native merchants in opposition to the Imperial Bank of Persia, but it is not of any importance, and their opposition soon fell through, and they now practically are what their name states, but a trading company. They have a capital of 500,000 krāns, in shares of 250 krāns each, all of which have been taken up. There are six directors, all resident in Shiraz ; they pay dividends twice a year. It is stated the last one that was paid was at the rate of 15 per cent. per annum. They have offices in Bombay, Ispahan, Yezd, Bushire, and Tehran. They do business chiefly in piece goods and sugar.

Strange to say, the natives have a good deal of confidence in them, and in consequence they do a fair business. Their offices are small, and conducted with but little expense. This is the first venture of anything of this kind in this part of Persia, and it is to be hoped that it may continue, and be a success. If the merchants of the country will only see that they can work in this way, and be able to make a good thing out of it, they will soon increase the trade of the various places. They will themselves gain power and be more chary of allowing the priesthood and others to interfere in mercantile affairs, and to disturb the trade of the country.

Wheat

The wheat export of the gulf littoral was stopped again this year, although the crop in those parts was a full one ; but on the uplands the reverse was the case. There, nearly all over Fars, the crop was an absolute failure, due firstly to want of good spring rains, and secondly to a descent of locusts. As nothing is ever done to get rid of the eggs or kill the young, these pests increase from year to year, and their devastations become more serious. Some little time after leaving Shiraz I heard that locusts

had again visited the place, and that Shiraz and its environs for 30 miles had been completely eaten up by this plague.

To add to the general depression, and in consequence of it and the prevailing scarcity, the poor people in the town, backed by the religious orders, rose against the authorities; for some 5 or 6 days the place was in the hands of the mob. The soldiers disobeyed their orders, and sided with the mob. Matters were not quieted down, nor did the place resume its usual quiet, until an abnoxious individual, the mayor of the town, was, by order of the Shah, expelled.

It will be some little time before Fars can recover itself after all its misfortunes.

As the rest of the journey was made chapar, or post, along a road that has already been well described, I leave it alone. The following information was collected:—

Kawamabad.—54 pair oxen for tillage. Belongs to late Hajji Nasir ul Mulk; supplied by kanāts; 75 tumans taxes; 80 houses; 310 population; 16,200 māns (210,600 lbs.) of grain sown yearly.

Deh Nao.—30 pair oxen for tillage; watered by river; 9,000 māns (11,700 lbs.) of grain sown yearly. Here carpets are woven, generally known as Shiraz carpets. Belongs to Sahib Diwan; 60 houses; 240 population. Taxes, 50 tumans.

Deebeed.—Watered by springs and river; 150 māns (730 lbs.) of grain sown yearly; 60 tumans taxes; 20 houses; 90 population. Station Indo European Telegraph Department. In summer large numbers of Arabs come and pitch tents here, and graze their cattle. Belongs to peasant proprietors. Ghileems and carpets woven here.

Khaneh Khoreh.—6 tofangchis; water only sufficient for passers by; 2 houses; 7 people.

Surmak belongs to peasant proprietors, under Shiraz. Watered by kanāts; 17,500 tumans taxes paid; 4,800 māns (62,400 lbs.) of grain sown yearly; 400 houses; population, 2,000; 50 jereebis watered in 24 hours.

Abadeh.—Owned by peasant proprietors; 3,500 tumans taxes on water supply; 500 tumans for grazing flocks; 3 kanāts; 4,000 māns (52,000 lbs.) of grain sown yearly; 1,000 sheep; 1,500 houses; 6,000 population; 20 shops of kinds. This is the seat of the Zabet.

Shulgistan belongs to peasant proprietors; 2 kanāts, which water 20 jereebis in 24 hours; 800 māns (10,400 lbs.) of grain sown yearly; 330 tumans taxes; 1,000 sheep; 100 houses; 430 population.

Yezdikhast belongs to peasant proprietors. Watered by river; 5,000 māns (45,000 lbs.) of grain sown yearly; 1,300 tumans taxes; 500 houses; 1,600 population. Fruit plentiful. Wheat here is celebrated for its whiteness; 2 kanāts. About 8 miles beyond Yezdikhast is the frontier of Ispahan and Fars.

Komishah belongs to peasant proprietors. This is a walled town of some considerable extent, but now largely in ruins. The seat of a Governor who is nominated from Ispahan, to which

Government this town belongs; 20 kanāts; 25,000 tumans taxes; 7 parishes of about 400 houses each. Total population, 18,000; 100,000 māns (1,300,000 lbs.) of grain sown yearly.

Mayar belongs to the State; 1 kanāt, by which 30 jereebis are watered in 24 hours; 20 pairs of oxen for tillage; 10,000 māns (130,000 lbs.) of grain sown yearly; 200 houses; 800 population.

Ispahan Trade.

Manchester goods. This has been anything but a successful year in this class of goods. The trade during the past year has been very bad, and importers have laboured under great disadvantages, owing to the want of money circulating in the bazaars and to the continued depreciation of the value of the Persian currency. With but little advance in local prices, the business done was small and little margin for profit left.

Towards the end of the year, at a time when usually the market is at its best, Manchester prices made a very considerable advance, and in consequence British importers made an effort to procure better prices. To a certain extent they were successful but not altogether so in getting a rise up to a par with the Manchester market.

A cause which greatly affected the sale of Manchester piece goods was the cholera epidemic which raged in the districts supplied by Ispahan.

Thus, generally the consumption of these goods has been very much less in 1892 than in previous years.

Everything has combined to render it difficult for importers to sell their stocks at profitable prices. Hence this special line of trade remains in anything but a satisfactory condition.

Opium.

Owing to various causes this year's crop was far below an average one.

In the first place a smaller amount of the poppy was sown, which was severely damaged, first by frost and afterwards by rain. Prices in consequence have ruled considerably higher than the equivalent value in China or Europe. In consequence European exporters have not been able to do much trade in this article, and so find an outlet for their capital, which already was restricted by reason of the heavy rises in exchange.

The amount sown this year is very much larger, and the promises of an average crop are good.

Cotton.

There has been a very fair crop of cotton in the Ispahan district during the year under report. Prices have recently considerably advanced in unison with the enhanced values of this article in other countries. Cotton grown in Persia is but poor in staple so that it finds but little favour in European markets. The native merchants chiefly buy it and ship it to Bombay where it is used for the adulteration of the Indian grown article and thus finds its way to Europe.

The Armenians of Tulfa export a small amount of Ispahan grown cotton to Russia.

Tobacco.

Since the downfall of the Persian Regie, tobacco in the Ispahan

market is a mere drug. The moollahs carry on their opposition even towards the Turkish company, the Société du Tombac and forbid the people to sell to their agents, thus the whole of the 1892 crop remains in the hands of the farmers and peasants, and in consequence there is great distress among them all. For a large circuit round Ispahan the villages are mainly dependent on their tobacco crop to pay their taxes and provide them with the general necessities of life. Their staple article, export tobacco, has now no commercial value and they do not know where to turn for money.

They have interviewed Agha Nedjefy and Sheikh Mohammud Aly on the question and begged them to find some remedy for the evil. These two individuals, who in this place, are the chief instruments in the destruction of the Regie are unable to set up a substitute. They have called the various chief tobacco merchants into their councils, but they, again, are unable to help. They say they will buy at $1\frac{1}{2}$ krans a m $\ddot{a}$ n provided the Ryats agree not to sow for two years. (The Regie paid on the average $3\frac{1}{2}$ krans per m $\ddot{a}$ n), this proposition the Ryats could not accept, and in consequence, the attempted arrangement fell through and matters remain as they were. Thus money did not circulate and the bazaars were probably affected. Some 200,000 tumans worth of tobacco is now stored away in the various village store-houses, much of which will become worthless.

Almond kernels were freely exported at fairly remunerative Almonds. rates, but the supply of them is somewhat limited. If brought from any distance the carriage runs away with the margin of profit.

Small supplies of raisins were exported by some of the Raisins. American dealers who trade with Russia. In this year the export was somewhat larger than heretofore owing to the action of Agha Nedjefy, who forbade the Mussulman to sell his grapes to Americans for wine making purposes. Thus those who had gardens were compelled to send their grapes into the bazaars and sell at 4 krans the load, whereas they were accustomed to get 16 krans a load (260 lbs.).

Happily, on the whole, the wheat crop was above an average Wheat. one, and so bread, the staple food of the peasant and labourer did not increase in price, but in the immediate neighbourhood of the city the crop was largely attacked by "Sen" and rust. The chief supply of grain for the city is derived from the districts of Chahar Mahal and Feridan, and here there was no disease, otherwise the general state of the peasantry of the districts and of the labouring man of the town would indeed have been bad.

The amount of grain cultivation in the districts belonging to Ispahan is very large. As previously shown Yezd is supplied from here, also Kashan and some other smaller districts. It has to be something more than a partial failure to materially affect the market. As a rule there is a sufficient store in hand to supply all the requirements of the province for two years at least.

Industries.

The chief industry of the town of Ispahan is calico printing, and it affords a living to a large portion of the population of the town. Except when the river Zainderud is in flood, its bed presents a curious sight; for a couple of miles at least it is covered with thousands of yards of red coloured cloth, undergoing the various stages of dyeing. To such an extent is this carried out that the waters of the river are discoloured and the stones of its bed at times look as if they had been laved in blood.

For the most part the work done is applied only to the ordinary every day commodities, such as handkerchiefs of various sizes, *purdehs* (door curtains), coverlets, wrappers, head gear, and such like articles.

But some dyers and printers devote themselves to really artistic designs, such as curtains for windows as we use them, here the designs are simply exquisite, similar to what one now and again sees in a piece of old Indian print. These relieved by a ground work of gold have a very fine and pleasing effect. I have seen some pretty panels done in the same style.

The industry is a very old one as can be seen by some of the dies which have been in use for centuries.

The whole design is cut out in relief on boxwood and then cut up into suitable lengths for the hand and fitted with a handle. It is, when in use, simply deeped into a basin of dye, the surplus moisture knocked off and pressed on the cloth. Young boys as a rule are employed in this printing.

Copper ware. One bazaar is entirely confined to the coppersmiths, who, to judge from the amount of work they always have on hand, and the great noise they make, must drive a very fine trade. Cooking pots, trays of all sizes and shapes, water bottles, ewers and basins, and numberless other articles of daily use are to be found here. Most of them are prettily and even artistically ornamented with engraved designs.

These various articles after having been fashioned from ordinary sheet copper, which is largely imported into the Ispahan market, into the required shape by persistent hammering are tinned over. Ispahan, after Kashan, is the most renowned place in Persia for its copper goods.

Another style of goods largely in vogue for use and ornamentation which may be brought under this head is the Ispahan brass ware. It is something like the Benares and Egyptian brass ware now seen so much at home, but in the opinion of many very inferior, both in design and workmanship. A small amount of it is exported.

Some very pretty lanterns, flower vases, and candlesticks are made, both engraved and perforated or *à jour*; quite the most pleasing effect is produced when the two systems are combined. If anyone who wishes to see and know what this brass ware is really like, I can but advise them to go to the South Kensington Museum,

and see their fine collection of these and most other Persian industries.

In Ispahan a good trade takes place in articles made of felt. ^{Felts.} The main things made are carpets, similar to those described as being made in Yezd and Kerman; an inferior carpet is made here, purely for travelling purposes. Another employment of felt is as horse clothing in the stable, and also under the saddle, such as we call a "numnah." A very large business is done here in making felt coats; these are made large and roomy, with arms, and are the staple article used by the Persian peasant as a protection against the great cold he has to encounter during winter in and about Ispahan. Lastly, felt is used very largely in making the hats generally used by all sorts and conditions of people when out in the districts. They are of various forms and shapes. Tell a Persian what style of hat a man wears, and he will be able to tell you whence he comes or to what tribe he belongs.

The leather of Ispahan is very good, and second only in ^{Leather.} Persia to that of Hamadan, which is somewhat like in style, texture, and smell to that which we generally call Russian leather. Saddles, boxes, appliances for all the various modes of travel used in the country, all the various trappings of a horse and mule are made here in the leather which is locally tanned. There is a bazaar entirely confined to this trade. There are also three bazaars the location of the shoe-making trade—in one are made the shoes usually worn by men; in a second are made women's shoes; and in the third only those made for the priesthood, which are of a peculiar construction, and are generally made of green shahgreen.

Besides the printing of cloths, as previously referred to, there ^{Dyeing.} is a very large dyeing trade carried on here; two bazaars alone are occupied by the Guild of Dyers. They are chiefly employed in converting white shirtings, &c., into those sombre cloths which are so affected by the Persian ladies in their outdoor costume. They also dye muslins to various tints of blue or light green, for the use of the descendants of the prophets, who use them either as a turban or a Kamar band.

This stuff is collected from a shrub found in the districts of ^{Gez, or Manna.} Khonsar, Feridan, and Chahar Mahal. It has been identified as the *Astragalus Anisacanthus*. It has the appearance of flour when made up into a sweetmeat, as is done in Ispahan. It is sent all over Persia, and is much esteemed.

The way of making this gez, or manna, is as follows:—

To 10 lbs. of the crude stuff 5 lbs. of boiling water is added, and well mixed; then strained; and afterwards placed over a slow fire. The refuse and impure matter falls to the bottom, and the gez is left pure. Of this one portion is taken and mixed with $1\frac{1}{4}$ times the quantity of good moist sugar, in a very shallow dish, and placed over a very slow fire; according to its consistency white of eggs are taken, put in a separate dish, and well beaten up. When thoroughly beaten up this is poured into the dish containing the gez and sugar mixture, and all well mixed over a slow fire. When ready for making into cakes is proved by its forming into strings

when pulled by hand. Pistachio nuts and almonds are cut up fine and put into the cakes as they are made. Some are made without any such addition, but the former is more esteemed. It somewhat resembles the French sweetmeat "Nougat."

Each cake is sprinkled with flour, and put into boxes for sale.

If a cake is taken in the hand and bent about it will not break. It is necessary to hit a smart tap with something hard, and then it is found to break up easily.

An inferior class of gez is made with honey.

The best stuff comes from Khonsar, and is known as gez konsari.

REPORT OF JOURNEY—Ispahan to SULTANABAD.

November 13. I left Ispahan at 12.25 p.m., following the road *riâ* the Cheharsu Shirazi for $1\frac{1}{2}$ mile, leaving the town by the Hamadan Gate. From this point the road twisted and turned along walls on one side and a fine canal on the other, until it came out in the open country near to the Atashgâh (fire temple), 5 miles. This is supposed to have been a place of worship of the old Parsee inhabitants. The hill on which the temple stands is an isolated one about 150 feet high, standing well up out of the plain. Whether there was a fire temple or not here I cannot say, but the present remains do not lead one to this impression, as the bricks which are to be seen are of a modern description.

Leaving this on the right, the upper valley of the Zainderud is reached. On all sides villages are visible, and everywhere the villagers are actively ploughing and sowing. Proceeding for another 6 miles, a fine road, with an avenue of trees lining it on both sides, is struck. There are many gardens about. After 2 miles the village of Khehseng is passed. When close to Nejefabad the avenue becomes a grand one of Chenar trees (Oriental plane). It being near sunset, we passed many flocks of sheep and herds of cattle making their way to their homes. At 17 miles Nejefabad was reached.

The village, or rather town, is large and prosperous. The house that I put up in was as good as any to be seen in Ispahan. The place is surrounded by gardens and vineyards, and it is somewhat celebrated for its grapes. The people of Nejefabad used to sell them to the Armenians of Julfa for wine-making purposes, but the celebrated Agha Nejefy has forbidden this, and in consequence the poor Nejefabad peasant is deprived of a means of subsistence. Nejefabad contains 1,500 houses, its population is 14,000. 1,000 sheep and many mules and donkeys are owned by the townspeople. Taxes, 18,000 tumans a year, which are "wakf" (sacred), to Nedjef, near Baghdad. It has a fair open bazaar which pays a tax of 500 tumans yearly, 5 hamâms, 3 musjids, 7 kanâts, and a small stream, 3,000 mâns (39,000 lbs.) grain sown yearly.

14th. Left Nejefabad. Barometer, 24.50; thermometer, 42°.

6.30 a.m. The road passed out of the town through the bazaars, and then out on to a Chehar Bagh (four gardens) similar to that one seen in entering the town, but only a mile long, thence out into the open country through fields, to the right and left many villages are to be seen, the road is broad and good. At 8 miles came to the village and garden of Hajjiabad, belonging to the Zil-es-Sultan; the garden is a very large one with a small summerhouse in the centre. Here, during the past hot weather the prince spent some six weeks; in the garden I noticed some Persian lilac in full bloom. The road thence followed the middle of the plain, which was here about 18 miles broad, direction west-north-west.

After 12 miles, I passed two villages on the left; at 14 miles, the village of Kohūn, a large and prosperous one; and at 16 miles came to the village called Tehrūn, but which is spelt Tehran. This also is a very large and prosperous place, its gardens and those of Kohūn abut on one another, and so give it the appearance from the distance, of being but one village.

Tehran, 16 miles; total, 33 miles. The village belongs to peasant proprietors; it consists of 3 parishes, one "musjid" (a fine large one), 3 hamāms. Watered by 8 kanāts and a small stream which comes from Dalan Kuh. It possesses three "mazras" worked by the people of the village, it has many fruit gardens, 1,000 sheep, 700 houses, 6,200 population, 7,000 tumans taxes, 10,400 lbs. grain sown yearly.

15th. Left at 8 a.m. Barometer, 24.30; thermometer, 40°. Passed along a lot of gardens, at 4 miles we passed over a small pass; up to this point the road had been accessible to wheeled vehicles, a very little work would permit of carriages passing here. Passed the village of Chahjah, a small one of about 50 houses clustered at foot of a kal'ah on top of a small limestone hill, this completely commands the whole plain and road. Hence to Tunderān the road is again good and easy for carriages, but not so wide as the previous part. Here there is a garden, and also a village, both belonging to the Zil-es-Sultan, the road on both sides is lined with willow trees. The garden is one of 90 jereeb, all about it looks very nice and clean.

We are now in Kerwand, a sub-district of Feridan. The Prince used to have a telegraph line up to here, but it has been dismantled.

Tunderan, 8 miles. Twelve pair oxen for plough, 130,000 lbs. of grain sown yearly, 700 tumans taxes, 20 houses, 120 people, 1 kanāt.

Leaving Tunderan by a road equally good, with a well filled water course on the left hand; after passing a good deal of cultivation at 12 miles came to the village of Jaffarabad belonging to the Prince, at 14½ miles Hafchan was passed, also belonging to the Prince, thence to Aliabad 17½ miles, leaving Mubareky on the right, and at 21 miles—total, 54 miles—Alwer was reached. All these latter villages belong to the Zil-es-Sultan. They are well constructed clean villages and look in good condition, cultivation seems to be continuous from one to the other.

Jaffarabad. 24 pair oxen for plough, 500 tumans taxes, 5,100 lbs. grain sown yearly, 24 houses, 150 population.

Hafchun. 1 kanāt, 60,000 lbs. grain sown yearly, 34 houses, 215 population, 400 tumans taxes, 23 pair oxen for plough.

Aliabad. 6 pair oxen for plough, 15,600 lbs. grain sown yearly, 12 houses, 80 population, 40 tumans taxes, 1 kanāt.

Alwer. 20 pair oxen for plough, 32,500 lbs. grain sown yearly, 30 houses, 200 population, 60 tumans taxes, 1 kanāt.

Kal'ah Nazir. 14 pair oxen for plough, 1 kanāt, 28,600 lbs. grain sown yearly, 30 tumans taxes, 40 houses, 180 population. Belongs to Zil-es-Sultan.

16th. Left at 8 a.m. Barometer, 24.25; thermometer, 30°. We have now got into the country where cultivation is partly by irrigation and partly by the chance rains of the early winter and spring.

The road led past Kal'ah Nazir and crossed a fine piece of alluvial plain under cultivation. When opposite to the Kuh Ahmed Riza, the village of Ab Garm to be seen away to the west of it. From Ahmed Riza the hills are continuous, they are known as Dalan Kuh; on them are to be seen the first snows of the season, the fall has been good in these parts and given the peasants heart to plough the hill sides and sow. At 4 miles pass Askeran on the left, at 5½ miles Kurda Pain, at 7 miles Daulatabad, and at 8 miles Kurda Bala, and at 8½ miles we came to Takyabad. None of these villages are large, nor do they appear over prosperous, they are all occupied by Armenians.

Takyabad was known as Madr-i-Shah, it was but a ruined caravanserai, it was repaired and was peopled by 24 families, but owing to bad times they have gone elsewhere, now there are but 4.

Kurda Pain. Belongs to the Zil-es-Sultan. 12 pairs of oxen, 15,600 lbs. grain sown yearly, 1 kanāt, 25 tumans taxes, 26 houses, 116 people.

Takyabad. 8 oxen, 13,000 lbs. grain sown yearly, no taxes, 4 houses, 20 people.

From Takyabad I followed the same plain, after going 11½ miles we came to a road branching away to the north, this I was told, was the main road to Khonsar. Then the road neared the hills to the left, and came on to some irrigated cultivation.

At 23½ miles arrived at Dumbeneh, a village at the end of the Dalan Kuh and between it and an isolated hill. The plain here might be said to finish as these hills practically shut it out from the west, to the north all was shut in by hills.

Dumbeneh. 23½ miles. Total, 77½ miles. It is a fairly large village with a Kal'ah partly in ruins in the centre. At various places on the road I had noticed cart tracks with considerable spread of wheels, here I came across them. The body of the cart is triangular with base of about 6 feet, wheels made solid with tyres of iron, one long pair of shafts; they are used for carting grain from the fields and from one village to another. A lighter and more suitable cart could easily be made and grain could be thus brought into Ispahan without difficulty. This village and the various others passed

were all full of grain, but notwithstanding the abnormally high prices of grain in the city, the people were forbidden under stringent orders to take it in. A good deal of discontent was shown in consequence.

Dumbeneh, belongs to peasant proprietors ; it has 50 pair of oxen for plough, 65,000 lbs. grain sown yearly, 200 tumans taxes, 1,000 cows, 500 sheep, 2 parishes, 300 houses, 1,500 population. About Dumbeneh are a number of good springs, which with a small stream form a marsh opposite the village.

17th. Left at 8.30 a.m. Barometer, 24.10 ; thermometer, 30°.

I crossed the stream by a small brick bridge, then the road crossed the plain due north, making for an opening in the opposite hills. At 4 miles arrived at this opening, at 6 miles joined the direct road for Khonsar, which was seen yesterday. At 7 miles a spring and watercourse was passed, at 15 miles passed the village of Gūshkary, thence the road led up a fairly easy ascent over spurs of the hills, at 15 miles got to the head of the pass, the last mile being stony and in places bad going. Thence a gradual descent down over the same sort of ground, and Khonsar was reached at 19 miles.

In all directions on the hillsides were a mass of low bushes of a sort of thorn like an umbrella blown inside out with its stick stuck in the ground. From these the manna or gez is got. Whether this is the secretion of an insect, or the exudation from the tree caused by the punctures of an insect, has not been definitely settled.

Major Sawyer has defined the shrub as the *Astragalus Anisacanthus*. The flat branches are covered with a secretion of a sugary nature. When ripe the natives place sheets under the shrubs which are then beaten with sticks and the gez, or manna, falls on the cloth.

The best and most esteemed comes from this place, Khonsar, and is chiefly sent into Ispahan to be made up into a sweetmeat, whence it finds its way all over Persia and even in small quantities to England. For description of making, etc., *vide* industries Ispahan. Khonsar, 19 miles. Total, 96½ miles.

It is a long straggling town built on the two sides of a ravine, which gradually widens as it descends, until it becomes a valley ; it has many lovely springs and is very picturesquely situated. The houses are built up of two and sometimes even three stories with quaint latticed windows. The ravine is full of very fine walnut trees. The hills to the west, above the town, are fine bold cliffs with a good covering of snow already. Down the centre of the town runs a fine clear stream of about 12 feet wide, turning many mills on its way. The streets and small bazaar were thronged with "*Seyyids*" and "*Moollahs*"; this place has an evil reputation for its religious fanaticism. It consists of 6 parishes with 2,400 houses, 10,000 people, has 5 caravanserais and 3 musjids, 13,000 lbs. grain yearly sown, taxes 5,500 tumans. It is residence of a sub-governor who is now away.

18th. Left at 8 a.m. Barometer, 22.65 ; thermometer, 37°.
(1719)

The road passes through the village and over on to the hillside to the east. At 2 miles we came to a junction with the road from Dehak, this is the usual route used for communication with Ispahan in winter as it is said never to be closed by snow. Then we wound along the hillsides and through valleys until we came out again in the Khonsar valley, where it opens out into a plain; we then came to the fine villages of Kuchān and Tijan with their numerous gardens, these are really but a continuance of the Khonsar ones. At 7 miles crossed a bridge over the stream Āb-i-Khonsar, the bed of the stream being very deep. Then at 9 miles entered into a small pass between two hills; at point of the hill to the right is a fine village with many gardens; then after going 2 miles, we made a short descent, which brought us into the Gulpaigan plain. From the hillside a good view of the whole plain with its numerous villages dotted about it is got, thence skirting the slopes of the hills to the left arrived at Gulpaigan. $17\frac{1}{2}$ miles. Total, 114 miles.

Gulpaigan is a straggling town with many of its houses in ruins, having stagnant water in the open spaces, its cesspools all open and the streets narrow and dirty. The place covers a good deal of ground, but as so much of it is in ruins, it is not so populous as it would seem to be. There is a small unimportant bazaar; the place is really but an agricultural centre. It is chiefly noted for some very good wood carving, fully equal to that which comes from Abadeh, and of the same type and character. A good deal of wool comes in here, it is made up into coarse twine, and is sold in Sultanabad for carpet weaving.

The town consists of four parishes inhabited by Mohammudans and two by Jews; it has 5,000 houses, 20,000 population, 1,200 being Jews, 15 musjids, 20 hamāms, 1 college, 2 caravanserais, 16,000 tumans taxes for the whole district, is watered by springs from the hills and also by leads from the river Āb-i-Khonsar, which passes the town on its western side.

At 8 a.m. Barometer, 23·85; temperature, 35°.

At 5 p.m. Barometer, 23·90; temperature, 41°.

19th and 20th, halted at Gulpaigan on account of illness.

At 8 a.m. Barometer, 23·90; temperature, 37°.

At 5 p.m. Barometer, 23·95; temperature, 42°.

21st. Left at 8.15 a.m. The road passed through the northern part of the town, thence through gardens and fields; after going a mile we came to river Āb-i-Khonsar (locally known as Karj), which is crossed by a brick bridge of three arches; it is about 30 yards long; the bed of the river is deep, with very little water in it now. From the bridge, the road leads up the slopes of the hills by a gentle ascent. From Gulpaigan there is another road which turns these hills, known as Kuh-i-Halwan, keeping out in the plain; it is, however, some 2 farsakhs (7 miles) longer. At 7 miles came to a small village on the hill side, Robat Zelliah; height about 7,500 feet. Barometer, 22·425. From here road led up through the hills until the summit of the pass was reached, 8,100 feet about. Barometer, 21·925; then down, at first a somewhat sharp descent, with nasty little tracks among the shale out crop, then a long gradual descent brings

one down into the plain of Kamareh, and at 21st mile, Komain the chief town of the district, was reached. Total, 135 miles.

The Zarbet was not in the place, being concerned in quieting some disturbances in another part of the district.

The plain is nearly a circle of 25 miles diameter, full of villages. The district is purely an agricultural one, but some of the villages which abut on those of the Sultanabad district (Irak) weave carpets.

The town of Komain is really but a large village, it has no buildings of any class, its streets are narrow and dirty; 390,000 lbs. of wheat are sown yearly. It consists of 3 parishes, 1,200 houses, 8,000 population, water from the river and from 6 kanāts provide for irrigation, 1,000 tumans taxes. The whole district pays 12,000 tumans.

At 7 a.m., 22nd. Barometer, 23.85; thermometer, 37°.

Left at 7.55 a.m. Road passed through the village to the north-west; we passed in succession, with interval of few minutes the following villages, after crossing a small stream:—Abbasabad on right, then Kokah on left, a good kal'ah outside this village to the west. Damian also to the left, Isfendiar also to the left, Ahshukah to the right, Sartag to the left; much cultivation and many water-courses were passed. After 4 miles all cultivation ceased, the road easily crossing a slope of the low hills on the right, whence all the district of Kamareh was visible. Many nice-looking villages could be seen nestling in the bays of the distant hills to the east. At 5 miles a fine broad road running due east and west was crossed; this was the main road from Kashan to Kermanhah. At 7 miles crossed a low range of hills into a small rich alluvial plain under cultivation, but dependent on rainwater alone; no kanāts about. At 10 miles the northern edge of plain was reached; after crossing another lot of low hills we came out on the Warcheh plain. At 11 miles came to the Armenian village of Warcheh; beyond this, at 12½ miles, was the Mussulman village of the same name. The road passed through this village and over the same plain for 4 miles, all alluvial ground, well ploughed and ready for sowing as soon as the rains fall. At end of the plain came to a drop in the ground; it was much cut up by water-courses, and bore much resemblance to a small cañon. On a small hill in the middle was the ruined kal'ah of Banek, then we went on to another plain equally well ploughed and ready for sowing. At 19 miles came to the head of a small pass; on the left, in a bay of the hills, was seen a large village, called Guzal (Turkish for beautiful); the pass led down to another plain, in which, at 21 miles, the small village of Hassanabad was passed, and at 22 miles Guili was reached.

Distance, 22 miles. Total, 157 miles.

Warcheh Pain has 25 pair of oxen for plough, 32,500 lbs. of grain is sown yearly, 75 tumans taxes, 30 houses, 180 people, 1 kanāt.

Warcheh Bala: 50 pair of oxen for plough, 65,000 lbs. grain sown yearly, 600 tumans taxes, 100 houses, 500 people.

Both these villages belong to the Saram-ud-Dowleh, the Prince's nephew. Carpet weaving is carried on in them; the Armenians

work for themselves; the Persians weave for the European firms in Sultanabad.

Guili possesses 30 oxen, 52,000 lbs. grain sown yearly, 150 tumans taxes, plus 2,700 lbs. of grain; it has a good *kanāt*, also belongs to Saram-ud-Dowleh, 60 houses, 500 population, 1,000 sheep; there are about 25 carpet looms in village. It is celebrated for the excellence and size of the carpets woven, and the purity of the dyes used in colouring the wool for weaving.

At 7 a.m. Barometer, 40; thermometer, 32°.

23rd. Left at 8 a.m. Road bore down a gentle descent through cultivated ground towards a break in some low hills to the north-west. At the end of these hills the plain of Faraghan with its numerous villages was to be seen, also the easternmost edge of the Salt Lake of Sultanabad. At 6 miles, the road bore a couple of points to the westward up a gentle incline. At 7 miles, we came to a junction of two roads, the new one coming from the south-east; then after half a mile through some small hills we came to the head of a little pass; then we descended for a mile through some broken ground. At 8½ miles came to a spring with a little cultivation, thence the general direction of the road along the northern slopes of the hills bore north-west. At 16 miles came to a point of the hills, whence, when rounded, the town of Sultanabad lying under some hills slightly north of west was seen. At 20 miles arrived at the gate of the town.

Sultanabad.

Intermediate distance, 20 miles; total, 177 miles.

Sultanabad is the chief town of the province of Irak; it is quite a new town. In some maps of Persia of the earlier portion of this century the place is not found marked at all, in others it is known as *Shahr-i-Nao*, or the New Town.

It lies on the western corner of a large basin many miles in circumference. It is of considerable importance, and owing to the development of its carpet trade is likely to become of even more importance still.

The town proper is a square compact mass of buildings with straight, and for Persia, wide streets, running from end to end and side to side at right angles to each other. Down the centre of each street is a water-course. It was surrounded by a mud wall and ditch, but these now are being destroyed and the space utilised for building; all around the town in every direction houses are being built and gardens laid out.

The whole place shows every sign of vitality. The bazaars are good, fairly well constructed and full of people. There is one long one of about 600 yards; from this short ones of 50 to 100 yards branch off at right angles and also many clean and well-constructed caravanserais.

The town is divided into a number of parishes, some 40 in all. It has 11 "*musjids*," 30 *hamāms*, 1 college, 21 caravanserais, 16 *kanāts*, 8,000 houses, 35,000 population (this I believe to be an exaggeration, for from what the best informed inhabitants told me I do not think the population can exceed 18,000 to 20,000). It is assessed at 35,000 tumans taxes annually, and the province at

65,000 tumans. The latter also supplies four regiments to the Persian Army. There are about 800 houses containing some 1,200 looms where carpets are woven.

The town and district of Sultanabad has been practically made by carpet weaving. In past times this district was always noted for its weavers, but they were to be found in Faraghan, and the carpets were known as Faraghan carpets. This is a small district about 20 miles to the north of Sultanabad. Carpet weaving.

Nearly 20 years ago Messrs. Ziegler, of Manchester, who have representatives in Tabreez, Tehran, Ispahan, &c., finding that exports from Persia did not afford them sufficient means to return their capital to Manchester, looked about them for additional ways of exit for their money and conceived the idea of developing this carpet trade. Mr. Alpiger, one of their employés in Tabreez, was deputed to work the question up, and it is due to his quiet persistence and never-failing courage that the trade has become the important one it is. With no assistance from Government and without any concession, but simply by good honest work and assiduity, in face of many difficulties and much opposition from the native merchants and dealers, bit by bit was the business built up, so that at the present moment we have nothing like it in Persia.

In no town of Persia have I seen such evidence, not of wealth quite, but of well-doing and of well-being. The people are all comfortably dressed and look contented and happy; they all live on the carpet weaving—its good effects are evidenced in the whole community. In my life in Persia, I have seen most of its more important towns, but no place impressed me so much as Sultanabad.

Messrs. Ziegler and Co. do not mean to allow the good work they have commenced here to slip from their hands. To enable them to keep even with the times and to feed the taste of the European and American carpet markets, they have built large premises just outside of the town, covering about 40,000 square yards, at a cost of some 6,000%. It is so large and imposing that the townspeople have given it the name of the Kal'ah, or the Fort. Here they have the dwelling-houses of their employés, their offices, store rooms, and most important of all, their dyeing rooms. It is thus by means of the latter that they are able to get true colours, in proper harmony and in accordance with modern taste. No weaver is allowed to use, as they much prefer to do, wool of his own dyeing unless they are absolutely sure of his honesty and of the trueness of his dyes, so that by this means they prevent any carpets with colours liable to fade getting into the market.

Their store rooms of dyed wool are a curiosity, acres of almost every colour conceivable are there seen—it is a very galaxy of colour. With quiet and order the various shades of wool are sorted out, weighed and given to the weaver, and at the same time a paper stating the amount of wool, the pattern of the carpet and its size; the same details are entered in a book, so that when he comes with the carpet his account is quickly made up. If he has made it true and well he gets a small reward, and if he has committed faults he is put under penalty. It is curious to watch the

gentlemen employed in receiving and assessing these carpets as they are exposed in the office, one glance of the eye is sufficient to detect everything that is wrong with the carpet under inspection.

It unfortunately happened that the day after my arrival in Sultanabad one of Messrs. Ziegler's people, who had only arrived a few days before from Manchester, died of small pox caught on the road. This, naturally, had a very depressing effect on everybody; and, although they did what they could for me in showing me all that was to be seen, yet it probably prevented me learning with profit much I might otherwise have done.

I have written at some length about Messrs. Ziegler's enterprise here only with justice, I think, as they are the pioneers of the work; but, at the same time, I must not omit to mention the other firm, which is represented at Sultanabad, namely, Messrs. J. C. P. Hotz and Son, of London, Bushire, Ispahan, &c. They were not slow to see the usefulness of this trade opened up here, nor are their eyes closed to its general advantages. They have prospected about in other places in Persia to develop a similar one. About 10 years ago they also started at Sultanabad, and entered into keen competition with Messrs. Ziegler's. They also have gone ahead, and have established their own dye works; they send out young men who have carefully studied the carpet trade, and, in fact, they do all they can to keep it at its present high level of excellence.

Besides these two firms, there are the various native dealers and traders, including Jews. I am sorry I cannot speak of them in the same terms as I have of the two European firms. For the sake of an insignificant saving in dyeing, they use almost entirely aniline colours. Whilst using some one of the lovely old Persian designs, a carpet of great merit as to weaving will be utterly disfigured and rendered valueless for the European market owing to its glaring staring reds, greens and blues, all made from aniline dyed wool. In other cases, a well woven carpet will not only be disfigured by these aniline dyes, but its design may be some hideous thing taken from a Manchester print of days long gone by. Most of these carpets find their market in Persia or in Turkey, but it is a matter of wonderment that the Persian who has known, and is so proud of the lovely artistic carpets, the production of the looms of his countrymen of past generations, can tolerate such utter anachronisms as the carpets above referred to. Aniline dyes have been prohibited entry into this country by the Shah, but yet they do find a way in; they come chiefly from Germany, I am told, and are smuggled in from Baghdad in boxes of sugar, and from the Caucasus in tins of petroleum.

Mr. Alpiger, Messrs. Ziegler's manager, told me that when he first came to Sultanabad, nearly 20 years ago, he found in the town only about 40 looms; now there are at least 1,200; and in the various villages about there are certainly another 1,500. I do not think I should be overstating it if I said that, altogether, some 3,000 looms are in work all over this country, involving an annual output of 5,000,000 krans worth of carpets. I have made most careful

enquiries and calculations on this head, and do not think I am making a very large error, either one side or the other. H.R.H. the Zil-es-Sultan, who was some few years ago Governor of Irak, has told me since my return to Ispahan that during his governorship the output was about 7,000,000 krans per annum; but this, according to well-informed people, is altogether too high an estimate.

The weaving of carpets is done by women and girls, 1 to every 21 inches of breadth (Persian half yard). They work from what is called a "*wagira*," or a transference. The pattern is first designed on sectional paper, and then is given to special men, who work it out. If the design comes out right, and is effective, it is then given out to a weaver, and from this single pattern probably hundreds of carpets are woven.

The wool yarn used for the design comes mostly from Gul-paigan. The cotton twist used for the warp is brought from Kashan. This cotton twist is fastened to two spars, and perpendicularly stretched to the utmost height of the room in which the loom is. Work is commenced from the bottom. As the work gets beyond the level of the eyes of the workwomen, the plank on which they sit is hoisted up; then, when they can go no further, the plank is lowered to the floor; the carpet is cut away from the lower spar, rolled up as far as necessary, and again fastened to the spar. These fastenings almost always show in the carpet, and sometimes small holes appear.

It seems to me that, when necessary, the Kerman way of rolling up the carpet on the lower spar is more effective, more economical and less harmful than the above system.

The pace of making carpets varies, of course, according to the will of the weavers, and also according to the season. An average good weaver makes about 5 inches per diem in an average day. A fair time for a carpet of 20 feet in length is considered to be two months; they are not often done much quicker.

The usual price for the weavers is 2 to 3 krans per week according to their proficiency. The men who act as agents towards the firms generally try to get as many wives as they can afford, one is told off to look after the house, the others, and all his female relations are told off to weaving, and he pockets the proceeds.

In a previous report on carpet weaving in Kerman I observed that I believed what had been done in Sultanabad could be done in Kerman, then I had not seen Sultanabad; now I am more of that opinion than ever, and I believe that anyone setting up in Kerman could very easily make just as fine and effective a business as has been made here. It is only a question of temper, courage, and spending a little money, everything is ready and waiting for the speculation.

With regard to the export of these carpets both firms complain strongly of the impediments needlessly put in their way by the Customs officials, as in these days it is of every importance

to get their carpets on the market in good time. It was hoped that the opening of the Karun River, and the road from Tehran to Shuster which would pass through Sultanabad would afford them much assistance, both as regards cheapening the rates, and shortening the time of transit; unhappily the road has not been opened, and the trials made do not justify them in their hopes of increased celerity, in fact they have had to give up the idea, and now they send their bales *viâ* Ispahan or Tabreez.

The Burugird, Dizful and Shuster road and thence by the Karun to Mohammerah would be far and away the quickest. At Sultanabad there is no Custom House, therefore the usual custom permits were not procurable, when the caravans with carpets reached Burugird the Customs there demanded 5 per cent. *ad valorem* duty, communications had to be exchanged with Tehran; so that some weeks elapsed before the bales were released. On arrival at Khoramabad the same story, and again at Dizful, thus before the goods got to Shuster, a distance of but 22 stages from Sultanabad, some five months had elapsed. As this was repeated more than once this route was abandoned. The average charge for a bale from Sultanabad to Shuster would be 25 or 50 krans per load; *viâ* Ispahan the average time would be about 50 days and the charges about 70 krans in good seasons, but at the present time they will average something like 50 per cent. above this. Also on the Ispahan road at Gulpaigan a tax is levied at $5\frac{1}{2}$ krans per load of carpets. The usual rate was $2\frac{1}{2}$ krans and this was not a customs tax but a road tax, and should be levied on the charvadars, or muleteers, but the man in charge calls it a custom tax so the muleteer puts it on the consigner. All these things, although apparently small and petty, yet in these days of keen trade hamper the merchant and reduce his already too small margin of profit.

Trade.

Manchester
goods.

In the print bazaars I saw fair quantities of Manchester goods; these are brought from Baghdad *viâ* Kermanshah, Tabreez *viâ* Kasveen and Ispahan. It was impossible for me to find out what amounts are brought into the place as there is no Custom House as stated above.

Other
imports.

In the caravanserais I noticed large stores of pig iron, solder, copper plates, some glass and crockery, all English; these had come *viâ* Baghdad.

Russian
goods.

Almost all the women I saw in the streets were wearing dresses and kerchiefs of Russian Turkey red prints. In the bazaars every second shop was stocked with this class of goods and also with ordinary prints and twills. They are brought from Tabreez, Kasveen and Tehran. The same reasons, as previously reported on when writing about trade in Yezd, were given for the prevalence of these goods. Russian semovars, cutlery, looking glasses, glass ware, and many little things of this character were in the various shops.

Besides carpets the only export I could find out of any value **Exports.** to England was gum tragacanth, small parcels of which are exported by both European firms; raisins, almonds, and skins are exported to Russia.

I cannot close this report on Sultanabad without expressing my thanks to the managers and employés of Messrs. Ziegler's and Hotz for all the trouble they took with me, the courtesy and kindness and information afforded to me.

ROAD, SULTANABAD TO KASHAN.

I left on 2nd, at 8 a.m. Weather very cloudy and snow threatening. The road for 8 miles followed the same road as that from Guili to Sultanabad, thence it crossed through some low hills and came out on to the lower portion of the same plain as Guili is in, crossing this plain in a direction east-south-east, after 16 miles arrived at the village of Ameerabad, the road then, keeping practically the same direction, made for the northern point of some low hills; this was reached at 20 miles, turning these hills came into the plain of Injedan; the village of that name was seen in our front nearly east under some high abrupt hills, it is a large village with many gardens and much cultivation. The village was reached at 24th mile by a stiffish bit of stony road winding through the fields and gardens.

Injedan. Owned by peasant proprietors. 70 pair oxen for tillage, 72,800 lbs. of grain sown yearly. Watered by a good spring at back of village. 200 tumans taxes, 150 tumans paid in lieu of supplying soldiers, 300 houses, 1,600 population, 250 looms for carpet weaving. This village is celebrated for its red dye.

3rd. Snowed all night and kept on during day, so we halted.

4th. Fine; bearing of road forward south-south-east. After leaving the village the road bore up to the hillside, and for 3 miles crossed the spurs of the hills, it was stony and rough, until it reached the short abrupt pass of Godar-i-Chenar, the pass only took 10 minutes to ascend, down the other side was a gentle descent, winding among small hills and so on for another 3 miles, the going being good and but few stones, then it came out into the open plain where Chenar was seen.

At 8 miles arrived at Chenar.

This village is situated on the southern slopes of the mass of hills behind Injedan. Chenar is a small village with a Kal'ah on a low sandstone hill. From this Kal'ah the whole of the Komain valley is to be seen, the town of Komain only some 4 1miles off.

Chenar has a good number of gardens about it. It belongs to peasant proprietors. Watered by spring. 18,200 lbs. grain sown yearly, 150 tumans taxes, it has 80 houses, 350 people, about 20 looms.

From Chenar to Mahallat there are two roads, the one *vid* Buzijān which is said to be 5 farsakhs = 22 miles, this is described as being a very hilly rough road, and the second *vid* Khogān, which is said to be 6 farsakhs and level going; we chose the latter. The Buzijān road starts from the village, and goes by a gorge in the hills about due east. We go nearly due east for a few hundred yards, then cross a deep ravine and strike a road running along the base of the hills south-east, then after 3 miles got out on to an open undulating plain, following this for 3 miles further come to the double village of Khogān which is in the district of Komain.

Intermediate distance, 14 miles; total, 38 miles.

Khogān. Has 30 pairs of oxen for plough; 39,000 lbs. of grain sown yearly; taxes, 300 tumans and 20 kharwars of grain; 150 houses; 550 people; 30 carpet looms.

December 5. Left at 7.30 a.m. Barometer, 23.825; thermometer, 31°.

Road bears nearly due east. It is a fine broad road, and is the main one from Kashan to Kermanshah, which was crossed from Komain when going to Guili. It crosses the same plateau as followed yesterday for 3½ miles, passed over a low pass, and then down hill gradually, winding in and about some low hills. At this point Buzijan in the hills to the left was seen. Then at 8½ miles came out at village of Saiyarah. This is but a small village, which has been lately built by Hajji Saiyah, or the "Wandering Hajji," who has brought a kanāt out here, and has built a village, Saiyarah. It belongs to Mahallat governorship. 1,560 lbs. of grain sown yearly, no taxes, 15 houses, 50 people.

After leaving the village, the road bearing east, crossed over a small plain. At 11½ miles came to very undulating ground, much scored by the washing and drainage of the hills. After going for 2 miles came out into another small plain with a village to the right, with some good water from a kanāt, then again over a lot of the same sort of undulating ground; at 12 miles, got to Mahallat. Intermediate distance, 20½ miles. Total, 58½ miles.

Barometer, 24.05; thermometer, 30°.

Mahallat is a long straggling town, quite embedded in gardens, lying almost enveloped by hills. It has many good houses, and a small disjointed bazaar. The valley is very fertile, much corn is grown about it, the climate is most salubrious. About Mahallat the Zil-es-Sultan is very fond of shooting; game of all kinds is said to be very plentiful.

Put up in the house of Hajji Saiyah. He is a most charming old Persian gentleman, who certainly deserves his title of "The Wanderer"; he has travelled literally in all parts of the world, and speaks most of the languages of the better known portion. The only part I could find out which he did not know was Australia, having only visited Sydney. He has a very fine well-constructed house, with a splendid chenar, or oriental plane in front. It is here the Zil-es-Sultan has generally put up.

The town is watered by springs and kanāts. Taxes, 1,800

tumans; also a poll tax of 5 krāns per head. The bazaars pay a tax of 300 tumans; 1,300 houses; 7,500 population. It is the chief town of the district, it has no speciality.

December 6th. Left at 7.30 a.m. Barometer, 24.10; thermometer, 33°.

The road passed out through a mass of gardens, with fine little runlets of water running through them, until it came out after $\frac{1}{2}$ mile into cultivation, then it went down hill and around the point of some round-topped hills out into the open country. It now bore straight to the eastward, making for a ford of the river; the first part of the way was over slightly rolling ground, then by a good road down to the village of Hafshehgird, 10 miles. The river bed here is about 250 yards broad, there is some considerable quantity of water in it; it would be difficult to cross when in flood. I am told that opposite to the village of Nummewar there is a bridge.

From this ford the road made straight for the village of Diliĵān, 14 miles. This is a fine prosperous-looking village, with many houses. It is a station on the road between Kom and Ispahan, usually taken by the Prince when he visits Tehran, of which the stages are Naizar, Diliĵān, Miar, Robat, Murchikhurt. From Diliĵān the road went up a slope, very gently making for Narak, which could be seen nestling between two ranges of hills some 10 miles ahead. At 20 miles, passed a well-constructed ābāmbār, and at 24 miles arrived at Narak. Total, 82½ miles.

At 5 p.m. Barometer, 28.875; temperature, 32°.

Hafshehgird. Peasant proprietors, watered from river, 2,180 lbs. grain sown yearly, 15 houses, 50 people, no taxes.

Narak, watered by a stream and by 2 kanāts, is under the Government of Mahallat; 1,104 tumāns taxes, 800 houses, 3,000 population, 48,000 lbs. of grain sown yearly.

This is a large straggling place, and has evidently had its day of prosperity, as some of the houses are large well-built ones. The people are said to be somewhat turbulent and are often severely punished for their misdeeds; hence the place does not progress, although it is on the main caravan road to Kermanshah from Kashan, which has been followed all the way.

7th. Left at 8 a.m. The road bearing north-east passed through the village gardens and up on to the edge of a very deep ravine, the other side of which was the abrupt scarp of a curious long hill full of caves and crannies. The road, which is very stony, gradually rises till at two miles it gets into the hills, then winding along their bases at 4½ miles joins one going north to a small district of the name of Jasl. At 6 miles we came to the head of a pass, barometer 22.95, the road then went due east gently descending among some small hills, bearing south-east, till it came out in a small fertile plain enclosed by hills. At 8 miles the village of Jushak was passed, and at 8½ Mehrt. At 11 miles, opposite a small spring on the left side of the valley, the village of Komar was seen. At 14 miles, came to the village of Mashhad, a large place with fine musjid or Imām-zadeh, and many good buildings. Here are said to be buried the two sons of Imām Jaffar, Sultan Ali and Sultan Mahmoud, who were

killed somewhere about here. This is a place of pilgrimage for all the surrounding districts. The pilgrims come on the 17th day of autumn and wash the carpet in which Sultan Ali's body was carried, and which, after being washed, is securely locked up and placed in the mosque. The Afghans in their great invasion of Persia destroyed this place. The mosque, &c., have been restored, but now are rapidly falling into ruins.

After passing Imāmzadeh, the road followed the bed of a stream for about 4 miles and then came to the village of Hassanrud. This village was in an offshoot of the same plain, it has many small "*mazras*." The whole has the appearance of being a fairly prosperous district.

Hassanrud. Belongs to peasant proprietors, 510 tumans taxes, 2 kanāts, 10,400 lbs. grain sown yearly, 100 houses, 450 population, under Kashan government.

Intermediate distance, 14 miles; total, 96½ miles. Barometer, 24·35; thermometer, 47°.

8th. Left at 7.40 a.m. The road went through some low hills and then out into a long sloping plain between the outer and inner hills, looking down into the Kashan plain. At 2 miles we pass the village of Chenar. At 9 miles enter some broken ground, and then into the bed of a torrent. At 11 miles, arrive at the village of Gul Abbasabad. From some hills above it Kashan can be seen through the prevailing haze. At 14 miles another river bed, crossing this and rounding a point of the hill come out into the plain above Kashan, Fin is about 2 miles to the right. At 21 miles arrive at telegraph office, Kashan.

Intermediate distance, 21 miles; total, 117½ miles.

From this point to Ispahan has been described by every traveller who has ridden through Persia; it would be a work of supererogation to do it again.

Ispahan.

My report for the year 1892-3 does not give any too glowing account of the state of trade in Ispahan, nor did it seem that there would be very much chance of its improvement, and I am sorry to have to report that bad as was trade in the above years, in this year, 1893-4, it has become worse, and it would appear that it will reach a still lower level.

Manchester goods.

There has been a falling off in these imports, but to what extent cannot be exactly found out. The Custom House in Ispahan is not conducted on any regular system at any time, but this year a new mode has been introduced, by which boxes and bales of the same class and style are brought under one heading, rendering comparison completely impossible.

It is known that the action of the mollahs in forbidding the Persians to deal with the Europeans in January, 1893, had a very ill effect, and reduced the flow of imports. In June there

was somewhat of a revival in the Manchester goods market, but this was nullified by the large increase in the sterling rate of exchange, which went from £=38½ krans to 43 krans.

To cause further disaster to the trade, an outbreak of cholera in the south of Persia, between Shiraz and Bushire, in September, stopped almost all carriage for some time. Neither mules nor camels could be got at any price, and when the epidemic had run its course, and the coast was clear, carriage rates went up to quite an unprecedented rate, thus causing great increase in the general expenses and putting the importers to further heavy losses. So, by the action of the moollahs in the first part of the year, the rise in exchange in the middle, and the cholera epidemic at the end, the European importer has been subject to heavy and severe losses, and the year for him has been a very disastrous one. But even here their misfortunes do not seem to have finished, as at the present time the repeal of the Sherman Act most completely disorganised the exchange, and sent it up from 43, at which it had been steady, to 46; and then later on, owing to large imports of silver into the country, it went on by heavy advances, till at the time of writing it is at 52 krans per £ sterling, and shows very little tendency to fall.

The advent of the summer when some of the export commodities come into the market may bring it down a little.

During the last two years two European firms have disappeared from Ispahan; this has not done such good to the others as it would appear it should have done, those now remaining are even too many for the trade offered in Ispahan, and it would seem almost that some one of the others would have to retire to give a chance of fair business being done. If the firms only worked in unison better results would follow, but on the contrary, business is conducted on such keen lines that, so to speak, they cut each others throats, and in consequence as a rule, the Persian consumer has, to use one of their own expressions, "their beards in his hands."

At the first, this crop was not expected to be a good one, as the severe frosts in spring severely damaged the young crops; on the whole the output has not been a real good one, but it has been somewhat better than was thought. Large quantities were brought in from Burugird (about 6,000 māns), this opium is not used for direct exportation as it is not very good, being deficient in morphia, on the average it only containing some 7½ to 8 per cent., whilst 10 to 11½ per cent. is the amount admissible). It is used for internal consumption and for adulterating such opium as contains morphia above the required quantity. Opium.

In London and China the markets were not too favourable and did not encourage the exporter, but latterly owing to the high exchange the market has become more open, and the export can be carried out at a profit, consequently some 2,200 boxes in all have been accounted for, the present prices range higher than ever previously known.

In late years there has been a decided decrease in the output (1719)

of this crop. A few years ago an average crop would be returned at 4,000 boxes; in 1889, a fair year, it was about 3,000; last year it was only about some 2,000.

It would appear that Persian opium has lost some of its hold on the China market, and thus the cultivation of it in this district has been somewhat discouraged. But also it seems that the cultivator is working out his ground. Year after year he plants the same succession of crops, getting sometimes as many as three crops from it. He does not plough deep, nor does he manure heavily but only top dresses; in consequence, it is found that a jereeb which used to give a crop of 2 māns, now only gives from $\frac{1}{2}$ to $\frac{2}{3}$ of a mān of opium.

For the present year an area has been planted which is calculated to give some 2,500 boxes. It is anticipated that in the following year a very much larger quantity will be planted.

The Persian merchants are looking with keen and anxious eyes to the proceedings of the Opium Commission in India, and their future conduct will be greatly biased by its report.

Tobacco.

The unfortunate collapse of the Regie is still being felt very much in the districts of Ispahan—almost the whole of the crops of 1892-93 are still lying in store in the town and various villages; this stock amounts, in round figures, to something like 2,000,000 krāns. The peasants are thus at a great loss; they have no money to pay their taxes, or to pay for necessities in the bazaars; in consequence they are in great straits; last year they appealed to Agha Najefy, who then called the merchants into council, but nothing could be done—the merchants said they could not help. This year Agha Najefy says that by means of geomancy he has found a way out of the difficulty, and that is, for the merchants of Ispahan and elsewhere to form a company for the purchase of the tobacco in the market, which is only to be purchased under a stipulation from the grower that he will not sow for two years. No tobacco is to be sold or purchased except by this company. In fact, it is proposed to form a monopoly. If anyone asks the Agha whether he can buy tobacco or not he invites him to join the company, but will not give a direct answer. The papers regarding the company have lately come down to Ispahan. The company, if ever formed, has some curious stipulations. Its capital is 2,000,000 krāns, in shares of 1,000 krāns each, 5 per cent. per annum is to be paid on the shares, and accounts are to be rendered once a-year. The money is to remain in the company's hands for 7 years and not to be touched; at the end of that period, if any money remains, it is to be divided among the shareholders.

No shareholder holding less than 20 shares has a right to ask any question. Neither in the Shah's firman authorising the establishment of the company, nor in the notice of the company is there anything about a monopoly, yet it is quite understood here that it is one, and also strict local orders have been issued forbidding peasants to sow. But all this is locking the stable door after the horse has been stolen. The tobacco trade is disappearing or rather has disappeared, from Ispahan, not to be revived it would

appear. The Turks have taken the bull by the horns and have risen superior to the situation, they have planted tombakoo round most of the large towns of Mesopotamia and Asia Minor and so have become entirely independent of Persia.

I am told by a friend who has very lately come from Bagdad, that in 1892 a crop of 30,000 kilos was the outcome of an experiment near Bagdad, and that being so successful, a larger area was taken into cultivation last year and the crop returned was 300,000 kilos, or equal to 5,000 bags of Ispahan tombakoo. This experiment was undertaken by the Société-de-Tombac of Constantinople. It is considered to be perfectly successful, and they now look upon themselves as quite independent of Persia.

Thus the poor peasants of Ispahan, Shiraz and Kashan have to thank their self-seeking moollahs for having deprived them of a trade which enabled them to face the world and have some little comforts in their homes. How they are to develop a source of income to replace this lost one is one of the problems of the future. It will have to be seen if Agha Najefy can bring his powers of geomancy to their aid.

The export of tombakoo in the year 1891-92 was about 50,000 bags; in 1892-93 when the result of the collapse of the Régie was felt, but before they had sent away all their purchases, 30,000 bags; and last year but 2,837 bags.

Cotton. There has been somewhat of a large increase in the export of this article, viz., from 44,300 lbs. in 1892-93 to 1,150,000 lbs. in 1893-94. To India the export has been about the same as the year previous, the increase is due to the Armenians exporting it to Russia. The price also has gone up from $4\frac{1}{2}$ krans to 5 krans per 13 lbs. It is possible that there may be a further increase in the output as the peasants are likely to plant this in such places as will admit of it in place of Tambaku.

In the return attached to this report, almonds appear according to the classification adopted by the custom house, but owing to the late frosts in the spring, the output of almonds has been very small, the crop having proved a failure.

Agha Najefy having prohibited the sale of grapes for making wine to the Armenians of Julfa, a large quantity of raisins have been made, and exported to Russia by Armenian dealers. The difficulties and expenses of carriage to the Gulf ports and the prices ranging in our home markets, do not admit of this article being exported with any profit.

In the attached lists of imports and exports many of the articles are shown twice, they are imported in from the districts and exported out again and *vice versa*. At the same time some districts of the province are fed direct from outside without passing through the city of Ispahan, the returns therefore do not show really what the total amount of business is done in the province. But in regard to Manchester goods this is not the case, although they have passed through the customs and are shown as entering, they are not again shown as going out. These are sent to Kashan, Kom, Tehran and all over the districts of the Ispahan Government.

Ispahan, probably with the sole exception of Tabreez, is the most important commercial centre in Persia. It supplies the northern towns by means of its local native merchants with all that comes from England by sea in the way of Manchester goods. It imports tobacco, cotton, silk.

With Yezd it exchanges its wheat and rice for locally made cotton and silk goods.

From the central provinces such as Irak, Hamadan, Burugird, it receives opium, wheat, and carpets, and gives some little piece goods.

From Kermanshah a small quantity of tobacco for the pipe is received yearly, but there is not very much trade between these places. Baghdad being nearer and handier, is the chief source of supply to this town.

It sends to Resht and *via* Kazveen to Russia, dried fruits, silk goods, lamb and fox skins, receiving in return petroleum, lamps, crockery and candles.

Russian trade. Russia used to send a large quantity of sugar, but that commodity has disappeared from the market, being superseded by Marseilles sugar, which the conservative Persian still calls by its old name of Russian sugar. It also received cotton goods but that trade has nearly disappeared too. In the past year, I cannot learn that any serious business has been done in Russian prints in the Ispahan bazaars, certainly not more than 50 bales all told have been received; these have only come in small quantities through the Persian merchants. In 1892, the Russians sent some large quantities to Tehran as a tentative measure, but the speculation was not such as to encourage them as they lost money by it, and consequently they scarcely sent any in the year under report. It was understood that they were going to organise a regular attack on our trade here but nothing up to the present has been done. Our importers have, however, found it necessary to have cotton goods printed in the same style and designs as some of the Russian prints. These are known in the bazaars as *chit-oorus*, or Russian chintz. Travellers who hear this are rather prone to jump to the conclusion that these are absolutely real Russian goods and to lament over the decadence of English trade in Persia.

I have, I am sorry to say, not been able to report too favourably of the state of English trade in Ispahan, but up to the present Russia has made no impression in the more serious markets. That her glass and crockery, semovars and hardware, should find a market here is not to be wondered at seeing how much nearer and easier the ways of transit are. Curiously enough, although a Persian loves a knife of the well known Rodgers brand, yet he likes it to be given him, he does not care to pay for it; when he buys one for himself, he goes in for something cheap and nasty, consequently Russian cutlery is mostly to be seen in the bazaars.

Carriage.

The carriage of the place is done quite indiscriminately by mules, camels, and donkeys. The mules are mainly bred by the Bakhtiari who also breed very good horses, sturdy and strong and wonderfully good on the hillside. Donkeys are bred all around in the various villages of the districts. Camels are bred in the south

and about in the villages near the desert and in Azerbaijan. Being in the centre of the high road from Bushire to Tehran, Ispahan is not dependent on its own local supply of carriage but is fed by all the districts within those limits.

It will be seen that at the present time British trade is, especially in Manchester goods, not showing any great vitality in these provinces. It will be noticed that there are three deterrent elements at work operating against its expansion, namely—the animosity and periodic interference of the moollahs, the obstructiveness of the custom house official, and the heavy and continual increase in exchange. If, however, the moollahs were put down in their place and trade be allowed to follow its proper lines, so long as the exchange kept fairly steady and enabled the merchants to rely on their calculations, then trade would answer to the pulse of the local markets. Summary.

One element of detriment to trade is the present system of customs.

The whole system of levying customs is radically bad. It is bad for the importers, bad for the consumer, and, most of all, bad for the Government—*i.e.*, the Shah.

For the importers (Europeans) it is bad because the system is not uniform; the European has to pay to the customs at the port of entry a 5 per cent. *ad valorem* duty. In some cases this operates to his advantage when his objective is up country, as the native importer, although paying a less duty at the port, yet has to pay $1\frac{1}{2}$ to 3 per cent. more at each town through which his goods pass, so that in the end he may have to pay from 8 to 10 per cent. in all. At the port of entry the native has a large advantage over the European on nearly all goods. On the main line, Bushire to Tehran, it is very rarely that complaints regarding undue detention of goods now occur, the custom officials have learnt that it does not pay. On the side lines, as for instance Bunder Abbas, Kerman, Yezd, and Mashhad; Mohammerah, Shuster, Dizful, Sultanabad; or Baghdad, Kermanshah, Hamadan, such detentions are continually recurring, and much trouble and loss ensues to the European importer.

The whole of the customs of the country are farmed by His Majesty the Shah to one man, he again sub-farms in districts; the sub-farmers again farm out to others in the several towns.

Under this system of working it is patent that large sums of money find their way into men's pockets, which otherwise, under a proper organised custom service, would come to the Shah. If, however, the Persian Government could be induced to establish a proper customs service, while it might conduce to the development of trade, it would prevent certainly any chance of its retrogression.

Annex 1.—RETURN of the Principal Articles of Import for
Ispahan during the Years 1892-93.

Articles.		Amount.
Sal ammoniac	Loads ..	110
Zinc, wire, solder, and sheet-brass	" ..	874
Iron of all kinds	" ..	2,124
Wooden boxes from Shiraz	" ..	1,340
Crockery	" ..	124
China-wood (drug)	" ..	20
Cinnamon	" ..	242
Gum sandarach	" ..	24
Tops of geevahs	" ..	52
Pickled ginger and mango	Jars ..	120
Cumin seed, nuts, and jujubes from Tehran	" ..	230
Printed stuffs from India, Shiraz, and Yezd	" ..	55
Tin	Boxes ..	933
Green fruits from Shiraz	Loads ..	397
Lime juice	" ..	427
Candles (stearine)	Boxes ..	3,190
Saltpetre and juzbas	Loads ..	329
Dates	" ..	726
Tobacco, Shiraz, Kashan, and Tabbas	" ..	7,533
Cardamoms, cloves, camphor, mace, and Indian tamarind	" ..	104
Stuff goods of all kinds from Yezd and Kerman	Bales ..	372
Wool, hair, taranjabin, from Tehran, Yezd, and Khorassan	Loads ..	424
Russian glassware	Boxes ..	350
Henna and colouring from Yezd	Loads ..	913
Spun silk and seconds	Doz.bndls.	975
Opium from Burujird and elsewhere	Mans ..	3,000
Naphtha	Tins ..	944
Tobacco (Tutün)	Loads ..	394
Stuff goods from Tehran and Yezd)	Bales ..	294
Cigars	Loads ..	54
Manufactured copper from Kashan	" ..	116
Stuff goods from Kashan	Bales ..	109
Wooden boxes, various articles of small-ware from Tehran	Loads ..	344
Alum, Bagham-wood, from Karvin	" ..	235
Planks for combs	" ..	394
Lamb skins for hats	" ..	114
Orange flower water from Karvin	" ..	55
Kamala	" ..	26
Sulphur from Shiraz and Tehran	" ..	350
Cast-steel	" ..	170
Senna	" ..	55
Mirrors	" ..	96
Quinine, worm-powder, and various other drugs	Bottles ..	1,270
Zangor, suranj, and various other colouring matters from Shiraz	Loads ..	46
Rice from Shiraz and Karvin	" ..	622
Sandarach, violet-colour, from Yezd and Shiraz	" ..	250
Bitumen and turpentine from Hamadan	" ..	264
Carpets and rugs from Hamadan and Sultanabad	" ..	182
Brass trays from Astrakhan	" ..	20
Oil for eating from Hamadan	" ..	139
Fox skins	" ..	15
Lamb skins, &c.	" ..	177
Sheep gut from Shiraz	" ..	30

Annex 1.—RETURN of the Principal Articles of Import for Ispahan during the Years 1892-93—continued.

Articles.						Amount.
Lote-kernels and cocoanuts from Shiraz	..	..	..	..	Loads ..	44
Paper from Shiraz, Hamadan, and Tehran	..	..	..	..	" ..	119
Leather, arsenic, gallnuts (Hamadan)	..	..	..	..	" ..	672
Honey	..	..	..	..	" ..	94
Mercury	..	..	..	..	Bottles ..	45†
Almonds and sultana raisins	..	..	..	..	Loads ..	754
Cloth	..	..	..	..	" ..	150
Prints	..	..	..	..	Bales ..	6,899
Shirtings (white)	..	..	..	..	" ..	2,560
" (grey)	..	..	..	..	" ..	1,124
Unbleached calico	..	..	..	..	" ..	4,572
Turkey reds, twills	..	..	..	..	" ..	1,153
Muslin and gauze	..	..	..	..	" ..	274
Cotton yarn	..	..	..	..	" ..	869
Copper sheets	..	..	..	..	Loads ..	4,593
Loaf sugar	..	..	..	..	" ..	10,888
Moist "	..	..	..	..	" ..	7,878
Tea, all kinds from Shiraz and Yezd	..	..	..	..	Boxes ..	4,544
Indigo, best quality	..	..	..	..	Loads ..	382
" common "	..	..	..	..	" ..	192
Pepper, turmeric, dried lemons, citron skins, &c... ..	..	..	..	..	" ..	3,932
Coffee	..	..	..	..	" ..	55

NOTE.—A load may be taken to weigh 280 lbs.

A bale " " " 140 lbs.

† 84½ lbs. weight each.

Annex 2.—RETURN of the Principal Articles of Export for
Ispahan during the Years 1892-93.

Articles.							Amount.
Copper sheets..	..	..	..	..	..	Loads	1,893
Carpet ..	..	..	..	..	..	"	207
Skins, lamb, goat, sheep, asses (ra w), and leather	..	..	..	..	..	"	432
Almonds ..	..	..	..	..	..	"	2,647
Cotton (cleaned) ..	..	..	..	..	..	"	1,477
Stuffs (to all sides) ..	..	..	..	..	..	"	3,434
Geevabs, soap, felt carpets ..	..	..	..	..	..	"	452
Boxes of small ware of Ispahan (as knives, scissors, padlocks, &c.), telegraph stores and wire	..	..	..	..	..	"	3,433
Tea, iron, gallnuts, cast-steel ..	..	..	..	..	..	Boxes	7,473
Oil ..	..	..	..	..	..	Loads	187
Raisins for Shiraz ..	..	..	..	..	..	"	243
Seeds (melon, cucumber, &c.) ..	..	..	..	..	..	"	144
Tobacco ..	..	..	..	..	..	Bags	30,000
Opium (boxes, 2,042) ..	..	..	..	..	..	Loads	1,021
Melons (Shiraz and Tehran) ..	..	..	..	..	..	"	450
Quince ..	..	..	..	..	..	"	186
Lamp oil, drugs, &c. ..	..	..	..	..	..	"	580
Hand-printed and canvas stuff goods of Ispahan ..	..	..	..	..	..	"	6,483
Wooden-boxes of smallware, melons, samorars, quince, loaf sugar, and sweetstuffs, &c. ..	..	..	..	..	..	"	8,936
Sugar, pepper, turmeric, cinnamon, cardamoms, cloves, solder, zinc, poppyseed, madder, rice, peas ..	..	..	..	..	..	"	16,777
Seeds of melons, cucumber, &c. ..	..	..	..	..	..	"	233
Soap, geevabs..	..	..	..	..	..	"	388
Carpets and rugs ..	..	..	..	..	..	"	337
Sheets of copper ..	..	..	..	..	..	"	686
Almond-kernels and other dried seeds and produce	..	..	..	..	..	"	1,800
Cotton, cleaned (city and suburbs) ..	..	..	..	..	..	"	3,875
Opium..	..	..	..	..	..	Mans	2,400
Lamb skins ..	..	..	..	..	..	Loads	582
Sheep ..	..	..	..	..	..	"	1,237
Goat and other skins ..	..	..	..	..	..	"	1,900
Tobacco, Ispahan ..	..	..	..	..	..	Bags	2,837†

† Of 65 lbs. each.

Annex 3.—RETURN of the Principal Articles of Import for
Isfahan for the Year 1894.

Articles.		Amount.
Stuff Goods—		
<i>External.</i> —Chintz, Turkey reds, calico (white and unbleached), muslin, silks	Loads ..	4,757
<i>Internal.</i> (From Yezd, Shiraz, Tehran, Bagdad, Kermanshahan, Russia, and Tabriz), cotton stuffs, silks, imitation shāl, muslin, Russian chintz and Yezd stuffs	" ..	4,720
		9,477
Wooden boxes—		
Liquors, eatables, glassware, &c... .. .	Loads ..	4,213
Chinaware, pottery from Shiraz (cups and saucers, flower vases, &c.)	" ..	657
Matches from all parts	" ..	1,268
Fragile goods, lamps, glasses, teapots, cups and saucers, kalians, finger bowls, candlesticks, mirrors, sugar basins, &c., brought in by "Companies"	" ..	1,555
		7,693
Sugar, pepper, turmeric, myrobalan, ginger, dried		
" lemons, juzbaz, &c.	Loads ..	9,421
Loaf and moist sugar	" ..	6,321
Pepper, turmeric, and skin of citron	" ..	1,380
Myrobalan and ginger, &c.	" ..	520
Juzbaz	" ..	1,200
Indigo	" ..	467
" Calcutta, best quality	" ..	25
Tea, all kinds.. .. .	" ..	3,610
Loaf sugar	" ..	7,294
Sheet copper	" ..	3,800
Brass wire, &c.	" ..	139
Cinnamon .. 189 loads		
Cardamoms, &c. .. 57 "	" ..	271
Camphor .. 25 "		
Skins—Lamb .. 373 "	" ..	382
Fox .. 9 "		
Naphtha .. 351 "		
Wool and hair .. 301 "	" ..	1,385
Alum 380 "		
Compieces, &c. .. 359 "		
Manufactured copper from Kashan	" ..	267
Tin 607 loads		
Sal ammoniac.. .. 33 "	" ..	855
Steel 116 "		
Dates 99 "		
Carpets and rugs	" ..	713
Opium (about 3 mans each)	Vessels ..	2,427
Soldier and zinc	Pieces ..	1,148
Iron	Loads ..	1,863
Candles (stearine)	Boxes ..	2,954
Mirrors 94 loads		
Russian glassware .. 402 "	Loads ..	496
Indian print goods	" ..	74
Tobacco (tombaku), from Shiraz 5,212 bags		
" " Tabbas 1,998 "		
" " Kashan 1,563 "	Bags ..	8,773
Spun silk and seconds	Bundles..	2,261
Tobacco and cigars	Loads ..	784
Paper	" ..	185

Annex 4.—TABLE showing the Bazaar Prices in Ispahan in February 1893 and 1894.

Articles.					1893.		1894.	
					Krs. shs.		Krs. shs.	
Beans	per man				1 15		2 4	
Pean	"				1 7		2 0	
Pistachio	" 1th				1 12		2 0	
Almonds	"				1 12		2 0	
Dried peas	"				2 12		2 16	
Nuts	" 1th				1 0		1 0	
Melon seeds	"				0 16		1 5	
Rice	"				3 0		4 0	
" second quality	"				1 18		2 10	
Treacle	"				2 0		2 8	
Fat (cooking)	"				9 12		14 10	
Cheese	"				3 4		4 8	
Raisins	"				3 4		2 16	
Dried peaches	"				2 4		2 8	
" apricots	"				10 0		10 8	
Walnuts	" 1th				0 15		0 12	
Curds	"				0 16		1 10	
Butter	"				8 0		12 0	
Soap	"				5 12		6 10	
Vinegar	"				1 2		1 4	
Dates	" 1th				0 13		0 15	
Melon	"				0 8		0 9	
Pomegranates	"				1 0		1 0	
Apples	"				1 0		2 0	
Bread	"				1 4		1 12	
Barley	"				0 16		1 0	
Straw (chopped)	"				0 4		0 5	
Charcoal	"				1 12		1 12	
Wood	"				0 3		0 5	
Grapes	"				0 16		1 0	
Sugar, Ispahan	"				8 0		9 10	
" Marseilles	"				9 0		11 0	
Manna	" 1th				2 5		3 0	
Eggs	per 100				2 10		3 10	
Fowls	one				0 15		1 0	
Meat, mutton	per man				3 10		4 16	
" beef	"				1 10		3 16	
Tea, black	" 1th				6 0		4 10	
" white	"				10 0		10 0	
Milk	"				0 18		1 4	
Candles	" pkt.				0 18		1 0	
Tobacco, Shiraz	" man				16 0		18 0	
" Ispahan	"				2 5		2 5	
Grey shirtings	per bale of 20 pieces						300 0	
" superior	" 20						400 0	
Muslin	" 50						850 0	
Mexicans	" 22						360 0	
Cambric	" 15						600 0	
Calico	" 20						566 5	
Turkey reeds	" 18						720 0	
Burnt bricks	per 1,000						35 0	
Lime	" kharvar						10 0	
Gatch (plaster of Paris)	" load						0 13	
Squared bricks	" 1,000						5 0	
Whitewash	" man						11 0	
Masons	" day						2 10	
Labourer	"						1 5	
Apprentice	"						0 15	
Carpenters	"							

Annex 7.—TABLE showing the Bazaar Prices in Yezd, in October, 1892.

Articles.		Value.	Krs. shs. |	
Rice	Per man	..	4	0
.. Shiraz	..	..	3	10
.. Lenjan	..	..	2	8
Fat (cooking)	..	..	12	0
Peas	..	..	1	8
Beans	..	..	2	0
Lentils	..	..	2	16
Treacle, grape	..	..	2	10
.. sugar	..	..	4	0
Dates	..	..	2	10
Melon seeds	..	..	2	8
Soup	..	..	5	10
Candles (dips)	..	..	7	0
Raisins	..	..	1	18
Castor oil	..	..	1	8
Wild olives	..	..	1	4
Dried plums (Bokhara)	..	..	4	0
Cheese	..	..	5	10
Potatoes	..	..	0	9
Apples	..	..	0	15
Pomegranates	..	..	0	10
Grapes	..	..	0	15
Water-melons	..	..	0	15
Pears	..	..	2	0
Curds	..	..	0	18
Quince	..	..	1	0
Cream	.. $\frac{1}{2}$..	..	0	18
Milk	.. $\frac{1}{2}$..	..	0	8
Cotton	..	..	5	0
Bread	..	..	1	8
Wheat	..	..	1	10
Meat	..	..	3	6
Sugar, local	..	..	9	0
.. candy	..	..	8	10
.. brown	..	..	7	10
Sherbert	..	..	7	0
Barley	..	..	1	0
Straw (chopped wheat)	.. 3 $\frac{1}{2}$..	..	1	0
.. (.. barley)	.. 5 ..	..	1	0
Charcoal	..	..	0	15
Wood, dry	..	..	0	5
Trefoil	.. 2 $\frac{1}{2}$..	..	1	0
Pistachio	..	..	0	8
Nuts	..	..	6	0
Almond kernels	..	..	0	11
Almonds	..	..	0	6
Loaf sugar, Russian	..	..	9	8
.. " French	..	..	9	8
Tea, black	.. lb. ..	..	3	4
.. white	..	..	9	10
Tobacco	.. man ..	..	8	0
Pipe tobacco (tutun)	.. 4 ..	..	3	0
Candles (stearine)	.. packet ..	..	1	0
Opium (prepared)	.. 1 man ..	..	32	0
Fowls	.. each, 15 sh. to ..	..	1	0
Chickens	.. 7 ..	..	0	15
Eggs	Per 100 ..	..	2	10

Annex 8.—RETURN of the Principal Imports for Yezd during the Years 1891-92.

Articles.		Amount.
T-cloths and white shirtings	Bales.. ..	4,700
Grey shirtings	"	1,400
Cotton twist	"	3,700
Prints	"	1,980
Turkey red twills	"	300
Cambrics.. .. .	"	200
Tea (case, 95 lbs.; bale, 182 lbs.)	Cases and bales	22,700
Sugar, refined (Mauritius, &c.)	"	12,500
" loaf	Cases.. ..	600
Copper	Tons	88
Iron	"	70
Tin pieces	"	5
Candle (stearine)	Boxes.. ..	6,000
Indigo	Bales.. ..	1,000

Annex 9.—RETURN of the Principal Exports from Yezd during the Years 1891-92.

Articles.		Amount.
Opium (cases 130 lbs.)	Cases	1,522
Cotton.. .. .	Bales	1,380
Almonds	"	4,200
Madder	"	600
Assafetida	Mans	3,500

Annex 10.—RETURN of the Principal Articles of Import to Shiraz during the Year 1892.

Articles.								Amount.
Beer	Dozens ..	1,200						
Spirits	" ..	2,500						
Shirtings, grey	Pieces ..	4,200						
" white	" ..	150,000						
Prints	" ..	150,000						
Turkey red twills	" ..	150,000						
Fancy goods	" ..	120,000						
Silk cloths	" ..	2,000						
Gold	" ..	2,000						
Brocades	" ..	1,000						
Mexicans	" ..	180,000						
Woollen and broadcloths	" ..	600						
Shawls	" ..	300						
Gold thread	" ..	6,000						
" lace	" ..	3,000						
Iron	Mans ..	150,000						
Copper	" ..	150,000						
Candles	Cases ..	6,000						
Loaf sugar (20 mans' case)	" ..	20,000						
Moist	Mans ..	1,200,000						
Tea (case 170 lbs.)	Cases ..	14,000						
Coffee	Mans ..	3,000						
Tin	" ..	3,000						

Annex 11.—RETURN of the Principal Articles of Export from Shiraz during the Year 1892.

Articles.								Amount
Raw cotton	Bales ..	24,000						
Opium	Cases ..	4,000						
Tobacco	Bags ..	20,000						
Almond kernels	Mans ..	200,000						
" in shell	" ..	500,000						
Lamb skins	Pieces ..	150,000						
Raisins	Mans ..	80,000						

Annex 12.—TABLE showing the Bazaar Prices in Shiraz in December, 1892.

Articles.			Amount.	
			Krs.	shs.
Beef (per Shiraz man, 7½ lbs.)..	..	Per man ..	1	0
Milk and curds ..	..	" ..	0	12
Butter ..	..	" ..	5	0
Cheese ..	..	" ..	3	0
Fat (cooking) ..	..	" ..	4	10
Meat (lamb) ..	..	" ..	3	0
" (mutton) ..	..	" ..	2	0
Bread, best quality ..	..	" ..	0	12
" second quality ..	..	" ..	0	10
Barley ..	..	" ..	0	8
Straw ..	..	" ..	0	2½
Rice, best ..	..	" ..	1	0
" ordinary ..	..	" ..	0	16
Figs and walnuts ..	..	" ..	1	4
Almond kernels ..	..	" ..	7	0
Raisins ..	..	" ..	1	0
Tea ..	..	" ..	40	0
Sugar, moist ..	..	" ..	2	16
" loaf ..	..	" ..	4	2
Coffee ..	..	" ..	7	0
Confectionery ..	..	" ..	4	10
Charcoal ..	..	Per 100 mans	12	0
Firewood ..	..	" "	7	0

EXPLANATION of certain terms used in this report :—

Jereeb = 1,200 square yards = about a quarter of an acre.

Man-i-shah = 13 lbs. avoirdupois.

" tabreez = 6·50 lbs. avoirdupois.

Dūng = one-sixth, a village is always divided into six parts.

Tak = a cup which has a hole in the bottom, this cup is placed in a vessel and when it is filled and sinks it is one measure of time. By this means each peasant gets his due proportion of the Kanāt measured to him. Thus "taq" becomes a measure of time.

Kanāt. Is indifferently applied to an open or an underground conduit of water now-a-days, but the water invariably, when so called, has its commencement in an underground conduit.

Jūb = an open conduit.

Kurk = the under wool of the Kerman sheep and goat.

Farsakh = a Persian measure of length, varies greatly from about 3 miles at Yezd to 7 miles in Khorassan. Absolute measurement should be 3·90 miles.

Abāmbar = a large covered-in water-reservoir

Mahala = parish.

MONEY.

1 kran = 6*d*.

1 tuman = 10 krans = 5*s*.

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1894.
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N^o. 1364.
DIPLOMATIC AND CONSULAR REPORTS ON TRADE
AND FINANCE.

PERU.

REPORT FOR THE YEAR 1893
ON THE
TRADE OF CALLAO.

REFERENCE TO PREVIOUS REPORT, Annual Series No. 1185.

*Presented to both Houses of Parliament by Command of Her Majesty,
MAY, 1894.*

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1894.

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Reference to previous Report, Annual Series No. 1185.

PERU.

CALLAO.

Acting-Consul Wilson to the Earl of Kimberley.

My Lord,

Callao, March 15, 1894.

I HAVE the honour to enclose to your Lordship my Report on the Trade and Commerce of Callao for the year 1893.

I have, &c.

(Signed) GEORGE G. WILSON.

Report on the Trade and Commerce of Callao for the Year 1893.

ABSTRACT of Contents.

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(1744)	A 2

*Shipping and Navigation.*Shipping
returns.

The number of merchant vessels of all nations entering the port of Callao in 1893 was 1,381, with a tonnage of 620,876 tons, which includes 791 vessels of under 50 tons register, and 9,881 tons. (See Annex 1.)

Compared with the entries in 1892 there appears to be a decrease of two in the number of vessels and 15,583 tons in the total tonnage, but with respect to British vessels only, the returns for 1893 show an increase over 1892 of 15 ships and 26,886 tons.

Arrivals and
departures of
British ships.

Of the 233 arrivals in 1893, 68 came from Great Britain and British Colonies, 5 from Brazil (in ballast), 1 from Belgium, 6 from Germany, 1 from Nicaragua, 10 from the United States, and 142 from ports on the west coast of South America.

Of the 239 departures from Callao during the same period, 10 were bound to the United Kingdom, 1 to Nicaragua, 3 (in ballast) to the United States, and 225 to coast ports. (See Annex 2.)

New line of
steamers.

The New York and Pacific Steamship Company, Limited, of London, have established a new line of steamers (called "The Merchants' Line") between New York and ports in Chile, Peru, and Ecuador, viâ the Straits of Magellan. Their steamers are advertised to sail from New York every 40 days, and the first of the fleet arrived here in April, 1893. Others have since entered Callao with very fair cargoes.

The following table shows the arrivals and departures from Callao of vessels of war in the course of the year :—

(1744)

TABLE showing the Movement of Vessels of War at Callao during the Year 1893.

Nationality.	Entered.				Cleared.			
	Number of Vessels.	Tons.	Crews.	Guns.	Number of Vessels.	Tons.	Crews.	Guns.
Peruvian	1	1,790	161	5	1	1,790	161	5
British	8	27,437	2,249	66	8	28,985	2,389	70
French	2	2,740	288	13	3	6,159	747	30
German.. ..	2	4,200	530	24	2	4,200	530	24
North American	4	6,925	773	84	3	5,225	581	28
Total	17	43,092	4,001	142	17	46,359	4,408	157

CALLAO.

Pilotage.

Pilotage at the port of Callao is not compulsory and there is plenty of room in the Bay and good anchorage in from 7 to 10 fathoms. Nevertheless, an individual representing himself as an authorised pilot has been in the habit of boarding in-coming foreign vessels, exhibiting a tariff of charges and setting forth that such charges would be payable whether his services were accepted or not. To check this imposition it was found necessary to issue a circular (see Annex 3) for the guidance of British shipmasters coming to this port.

Crews.

During the year the following movements in the crews of British vessels have been registered at this Consulate, viz. :—

					Number.
Engagements..	..	..	..	..	937
Discharges ..	..	..	..	..	880
Desertions ..	..	..	..	..	80
Total ..	..	..	..	..	1,897

Trade and Commerce.

Imports and exports.

It has been found impossible to obtain from the local custom-house a return of the imports and exports at this port, but the following statement gives the classification of cargoes inwards and outwards per sailing vessels as entered in the office of the port captain, the cargoes by steamers being all considered as general :—

Articles.	Inwards.		Outwards.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.
General cargo ..	21	17,908	7	6,486
Wheat ..	25	11,697	..	..
Rice ..	7	5,598	2	1,703
Coal ..	29	34,508	..	..
Lumber..	11	12,782	..	..
Nitrate ..	1	1,439	1	1,439
Old iron ..	..	..	2	960
Produce of country ..	99	17,871	71	12,734
Ballast ..	10	6,680	122	87,561
Total ..	203	108,483	205	110,883

Wheat.

The total quantity of wheat imported from Chile in 1893 was 28,759 tons in vessels of all classes.

Receipts at

custom-house. as under :—

The receipts of the Callao custom-house during the year were

Month.						Amount.	
						Sols	c.
January	..	..	..	..	..	146,920	49
February	..	..	..	..	..	205,169	13
March..	..	..	..	..	..	242,120	35
April ..	..	..	..	..	..	292,346	50
May ..	..	..	..	..	..	250,333	78
June ..	..	..	..	..	..	251,427	14
July ..	..	..	..	..	..	308,112	72
August	..	..	..	..	..	287,952	37
September	..	..	..	..	..	267,814	65
October	..	..	..	..	..	248,817	30
November	..	..	..	..	..	262,185	20
December	..	..	..	..	..	355,661	53
Total ..						3,103,861	16
Which, at an average rate of exchange of 2s. 3d. ..						=	349,746l. 17s. 7d.

The number of passengers arriving at and departing from Callao in 1893 were as follows:—

Passenger traffic.

					Arrivals.	Departures.
Per steamers	..	..	..	..	20,085	18,503
Sailing vessels	..	..	..	..	111	312
Small craft	..	..	..	..	245	469
Total	..	..	..	..	20,441	19,284

At the close of the year the following freights were quoted.

Freights.

Articles.	Destination.	Per Ton.
		£ s. d.
Nitrate ..	For orders to United Kingdom or Continent, less 1s. 3d. to direct port	1 3 9
Nitrate ..	(In wood) for orders to Hampton roads	1 0 0
Copper ..	To direct port in United Kingdom	1 0 0
Wheat ..	To United Kingdom or Continent, less 1s. 3d. to direct port	1 3 9
Guano ..	To United Kingdom or Continent, less 1s. 3d. to direct port, and 2½ per cent.. ..	1 5 0

As already reported, the Central Peruvian Railroad from Callao to Oroya is completed.

Central Peruvian Railway opened for traffic.

Passenger trains now run through, twice a week, and there is also a service of through freight trains by which cattle, sheep, and wheat are brought down from the interior of central Peru. It was expected when the line was opened for traffic that large quantities of ores would have been offered for conveyance to the

coast for shipment, but, unfortunately, the downward tendency in the value of silver has been the means of delaying the extension and working of the numerous mines in the districts through which the railroad passes.

In connection with this line a new trade has lately sprung up, namely, the supply of natural ice to Lima and Callao. This ice comes in large lots from a place called Galera, which is at the summit of the Andes, between Casapalca and Yauli.

Colonisation. The colonists on the banks of the Perené River are reported as having made fair progress in clearing and planting the lands they have taken up, and a new country of considerable value has thus been opened out to colonisation.

The Directors of the Peruvian Corporation are desirous to encourage as colonists that class of persons who can start with capital of their own, and state that from enquiries that have been made as to the prospects for planting coffee, cocoa, &c., in these newly-opened districts, they find that thousands of coffee plants are already in the ground, and it is believed there will shortly be an extension of the colonisation, and an opportunity of turning to profitable account the land grants of that Corporation.

Public Works.

Tramway. The tramway between Callao and La Punta, a neighbouring bathing place, has been extended during the year, a branch line of rails having been laid through a part of the town to the station of the Central Peruvian Railway, for the convenience of passengers arriving from Lima by that route. The Government buildings and new road to Chucuito, referred to in previous reports, are still in course of construction.

**New
buildings and
new road.**

Miscellaneous.

During the year Callao has been free from epidemics. The number of deaths registered was 1,144, against 1,462 in 1892. Eighteen British-born subjects died during the year.

**Births and
deaths.**

The births registered were 914, but this cannot be received as the correct number of children born within the period, as it is well known that in many instances parents neglect to register the birth of their offspring, notwithstanding the fine inflicted for the omission when discovered.

Burials.

1,080 interments took place in the native cemetery at Baquijano, and 64 at the British burial ground at Bellavista, 26 of the latter being of English subjects.

Sick seamen.

The movements of sick British seamen in the Callao hospital were as follows:—

	Number.
Remaining at January 1, 1893	6
Entered during the year	122
Total	128

Thus accounted for :—

	Number.
Invalid home	8
Died	3
Discharged cured	111
Remaining, January 1, 1894	6
Total	128

Annex 1.—MOVEMENTS of Merchant Vessels at Callao during the Year 1893.

STEAMERS.

Nationality.	Entered.			Cleared.		
	Number of Vessels.	Tons.	Crews.	Number of Vessels.	Tons.	Crews.
English	179	237,021	10,392	182	239,578	10,544
Chilian	104	146,470	7,282	107	149,247	7,467
German	33	50,655	1,263	33	50,653	1,269
French	27	57,503	1,126	27	57,503	1,131
North American ...	29	10,523	621	30	10,761	617
Peruvian	15	340	53	15	340	62
Total	387	502,612	20,737	394	503,082	21,090

SAILING VESSELS.

Nationality.	Entered.			Cleared.		
	Number of Vessels.	Tons.	Crews.	Number of Vessels.	Tons.	Crews.
Chilian	3	1,054	31	4	1,571	42
Danish	1	376	12	1	576	11
English	54	58,430	1,049	57	59,771	1,077
German	7	8,041	129	7	7,921	106
Honduran	5	2,150	52	4	1,719	45
Italian	2	1,951	33	2	1,918	34
North American ...	10	9,760	156	11	10,018	166
Norwegian	1	1,078	17	2	2,186	32
Peruvian	116	24,339	860	113	24,099	845
Spanish	4	1,104	45	4	1,104	45
Total	203	108,493	2,384	205	110,883	2,403

PERU

VESSELS UNDER 50 TONS

Nationality.	Entered.			Cleared.		
	Number of Vessels.	Tons.	Crews.	Number of Vessels.	Tons.	Crews.
Chilean	3	56	8	...	...	...
Peruvian	788	9,825	2,314	800	9,973	2,385
Total	791	9,881	2,322	800	9,973	2,385

SUMMARY.

Class.	Entered.			Cleared.		
	Number of Vessels.	Tons.	Crews.	Number of Vessels.	Tons.	Crews.
Steamers	387	502,502	21,737	394	508,082	21,090
Sailing vessels ...	208	108,485	2,384	205	116,883	2,463
Vessels under 50 tons	791	9,881	2,322	800	9,973	2,385
Total	1,381	620,876	25,443	1,399	628,068	25,878

Annex 2.—RETURN of British Shipping at the Port of Callao during the Year 1893.
Direct Trade in British Vessels from and to Great Britain and British Colonies.

Entered.						Cleared.					
Total Number of Vessels.			Total Tonnage.			Total Number of Vessels.			Total Tonnage.		
With Cargoes.	In Ballast.	Total.	With Cargoes.	In Ballast.	Total.	With Cargoes.	In Ballast.	Total.	With Cargoes.	In Ballast.	Total.
68	...	68	90,789	...	90,789	10	...	10	16,269	...	16,269

Annex 3—APPENDIX.

Notice to British Shipmasters.

British shipmasters are hereby notified that pilotage is not compulsory at this port: consequently there are no charges fixed by the authorities for such service. Therefore no payment should be made to any pilot for services rendered in the Bay of Callao, unless such services have been voluntarily called for by the master of a vessel entering.

By Art. 41 of the port regulations it is directed that, before the captain of the port has made his visit to merchant vessels entering the bay, such vessels shall not communicate with any boats whatever, including those belonging to the custom-house.

Art. 43 sets forth that on ships entering ports (Peruvian), and while under sail or steam, port captains will make the official visit and will point out the place of anchorage they should occupy.

In the second paragraph of Art. 124 it is stated that sailing vessels will not be visited after sunset, save in exceptional cases.

And in Art. 129 of same regulations it is laid down that if any vessel arrives during the night, and by reason of which, anchors outside the situation corresponding to the order established in said regulations, the captain of the port, on making his visit on the following day, shall direct that the required change be made, and designate the position that the ship ought to occupy.

GEORGE G. WILSON,
H.B.M. Acting Consul.

BRITISH CONSULATE, CALLAO.
July 13, 1893.

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AND FINANCE.

PORTUGAL.

REPORT FOR THE YEAR 1893

ON THE

TRADE, &c., OF ANGOLA.

REFERENCE TO PREVIOUS REPORT, Annual Series No. 1105.

Presented to both Houses of Parliament by Command of Her Majesty,
MARCH, 1894.

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1221. Mogador	2½d.	1281. Salvador	1d.
1222. Berlin	1½d.	1282. Malaga	4d.
1223. Rome	1d.	1283. Buenos Ayres	8½d.
1224. Constantinople	6½d.	1284. Canton	1d.
1225. Barcelona	2½d.	1285. Washington	4½d.
1226. Madeira	5½d.	1286. Warsaw	1d.
1227. Seoul	1½d.	1287. Pekin	1d.
1228. Chinkiang	1d.	1288. Amsterdam	1d.
1229. Newchwang	1d.	1289. Manila	2½d.
1230. Chungking	1½d.	1290. Bahia	1d.
1231. Hankow	1d.	1291. Munich	1d.
1232. Odessa	2d.	1292. Trieste	1d.
1233. Chicago	3d.	1293. Tunis	4d.
1234. Taganrog	2½d.	1294. Montevideo	1½d.
1235. Ningpo	1d.	1295. Belgrade	2d.
1236. Mannheim	1d.	1296. Teneriffe	1d.
1237. Dunkirk	1d.	1297. Stettin	3d.
1238. Macao and Timor	1d.	1298. Rome	2½d.
1239. Madrid	1½d.	1299. Dantzic	7d.
1240. Port-au-Prince	2d.	1300. Sofia	2½d.
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1247. Gothenburg	2d.	1307. Paramaribo	1d.
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1249. Fiume	2d.	1309. Naples	1d.
1250. Leghorn	2½d.	1310. Salonica	2½d.
1251. San Francisco	5½d.	1311. Valparaiso	2d.
1252. Bushire	2d.	1312. Mozambique	1d.
1253. Nagasaki	1d.	1313. Odessa	1½d.
1254. Smyrna	1d.	1314. Honduras	2½d.
1255. Yokohama	1½d.	1315. Batoum	4d.
1256. Stockholm	1½d.	1316. Quilimane	1d.
1257. Lisbon	1d.	1317. Copenhagen	6d.
1258. Tientsin	1d.	1318. Lima	1d.
1259. Port Said	1d.	1319. New York	1d.
1260. Hiogo and Osaka	2½d.	1320. Baghdad and Bassorah	1d.
1261. Damascus	1d.	1321. Rio de Janeiro	5d.
1262. Samoa	1d.	1322. Reunion	3½d.
1263. Rio Grande do Sul	2½d.	1323. Berne	1d.
1264. Jeddah	1d.	1324. Kankung	1d.
1265. Vienna	3d.	1325. Resht	3½d.
1266. Shanghai	3d.	1326. Florence	1d.
1267. Bangkok	1½d.	1327. Hokenate	1d.
1268. Meshed	1½d.	1328. Paris	2d.
1269. Cadiz	2d.	1329. Paramaribo	1d.
1270. Cherbourg	1d.	1330. St. Petersburg	2d.
1271. Erzeroum	1d.	1331. Patras	1½d.
1272. Christiania	5d.	1332. Catania	2½d.

No. 1333.

Reference to previous Report, Annual Series No. 1105.

PORTUGAL.

LOANDA.

Mr. Pickersgill to the Earl of Rosebery.

My Lord, *Loanda, January 20, 1894.*
 I HAVE the honour to transmit inclosed herewith a Descriptive
 Report on Central Angola and its Trade for 1893, based upon
 the journey which I made to the interior a short time ago.
 I have, &c.
 (Signed) W. CLAYTON PICKERSGILL.

Descriptive Report on Central Angola and its Trade for 1893

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Description. A spacious harbour, a city on sand and arid cliffs, a dry and sand-logged stretch of maritime plain, two inclosing rivers, and a magnificent Hinterland. Such is the heart of Angola, Portugal's most important colony.

Scope of report. The object of the present report is to exhibit a general view of this long occupied but little known region.

City of Loanda. To those who have not acquired the useful habit of reading Foreign Office trade reports, and other reliable works, a glimpse of the capital of Angola would afford considerable surprise. One does not expect to find much civilisation 8 degrees south of the line, on a sweltering African beach; but nevertheless, within a stone's throw, as it were, of the blazing equator, and the camp fires of Congo cannibals, St. Paul de Loanda has been a white man's city for upwards of 300 years. It has streets and squares and shops and warehouses, forts and churches and statues. There is a commodious custom-house and a large public workshop, a bank and two railway stations, an observatory, a well-appointed hospital, and an imposing town hall, the latter in course of erection. It is a city in which a European can buy almost everything which habit prompts him to possess, provided that he is indifferent as to quality and reckless on the point of expenditure. He can even coal a ship, or get the fly-wheel of an engine mended. He can hire a carriage, consult a lawyer, and subscribe to four newspapers. There is water laid on in his dwelling-house, and the streets are lighted from dusk till dawn.

Loanda harbour. There is no finer haven within the circuit of the African Continent than Loanda harbour. Formed by a series of scallops in the crumbling cliffs, and a long low sandbank which breaks the Atlantic swell, it was a gift of nature, abundantly roomy and as safe as a dock. At one time vessels could enter on either hand, and run close up to the town; but now the southern pass is practically closed, and the best of the harbour shows ominous patches of silt.

But a port, whatever its merits may be, is merely a gateway, and the city of Loanda is only a toll-house. Its inhabitants (some 2,000 whites and 14,000 blacks), with comparatively few exceptions, live upon the ebb and flow of traffic with the interior. Undoubtedly, therefore there must be something in the interior which pays.

River Quanza. The natural highway to this favoured land is the River Quanza (one of the two already mentioned as boundaries) which enters the sea about 40 miles south of Loanda harbour, and is navigated for 160 miles or so, although not without much bumping and scraping and transfer of cargo, by two light-draught steamers and an attendant fleet of barges belonging to a local company, as well as by similar vessels owned by private firms.

Kisama country. To the south of the Quanza there lies an enormous tract of raw, untutored heathendom, where picturesque savages, clothed in little but beads and charms, may be seen lolling in the shade

of fronded groves, whilst the pot of thickening palm oil simmers above the lazy midday fire. This is the Kisama country, nominally included in Angola. In the year 1580 there was war between its chiefs and Portugal, and about 80 miles up the river there remain to this day a conspicuous white fort, on the slope of a wooded mountain, and below, near the water, a massive white church, surrounded by a congregation of ragged huts, as evidences of intended conquest.

Perhaps the territory is not much worth a struggle. It presents, at many points, an appearance of uninteresting level covered with bush, and in the rainy season much of it is underwater. Hence the permanent dwellings of the natives are found on the ridges of intersecting hills, where they stand without other defence than that of situation, like so many miniature straw stacks, round, compact, and snug inside, with stout plank doors embellished with carving. More than any other tribe in this part of Africa, the Kisama seem gifted with the sense of beauty and consistent taste. But let no one on that account imagine that here is an opening for Manchester prints and fine art muslins. There is some little demand for checks and stripes, but even these are considered bizarre and unfinished. A Kisama belle soon takes the beauty out of them, and likewise the stiffening. She plunges them into a potful of boiling leaves, strong in tannin, soaks them in the rich black mud of a stinking swamp, rinses them out and dries them, and then finishes them with a rubbing of emollient palm oil. It thus becomes difficult for the manufacturers of Lancashire to know what is becoming and agreeable to the sleek brown skins of African natives.

A wrinkle for
Manchester.

In addition to palm oil, which is usually a slab pomatum, like railway grease, and palm kernels, which are the refuse of the native manufacture containing oil which cooking fails to extract, the Kisama country produces baobab fibre, beeswax, gum, orchella weed, and the wholesome looking food-stuff known as fuba, which is manioc root or maize or millet-seed, pounded and ground into flour, after being macerated in water and dried in the sun. These products are ferried across the river and bartered at the Dutch and Portuguese trading stations, which are found at intervals on the northern bank, for such white man's commodities as beads and trinkets, lucifer matches, needles and thread, cotton goods, gunpowder, muskets, and rum.

Kisama
barter.

On the civilised side of the river there is a considerable quantity of sugar-cane grown, the soil being richly adapted to such culture; and it is a well-known fact that sugar can be manufactured for less than 1*d.* per pound, and refined at about the same cost. But every white man throughout Angola pays from 6*d.* to 8*d.*, and in some cases as much as 1*s.* per pound for his sweetening, of which every ounce consumed is imported from Europe, whilst his black brethren get the full virtue of the cane juice in aguardente at 6*d.* Cheap rum.

Expensive
sugar.

per pint. The principal distillery on the Quanza produces over 80,000 gallons per year.

Dondo—the
centre of
trade.

Beyond the distillery and the isolated trading stations, at the point where the river ceases to be navigable, as it debouches from a gaping canyon, there stands, in a situation of great natural beauty, the most interesting town in the province. It is not a large place, nor is there anything attractive about its buildings. A broad public square, surrounded by squat-looking shops and warehouses; two or three adjacent streets of the same indifferent architecture; a few rows of the rubbishy shanties of town-bred people of colour, ranged behind under tropical foliage; and the whole within gunshot of the river, where the washerwomen wash and servants draw water the livelong day—that is Dondo. But Dondo is alive with dusky energy. It is a mart and rendezvous of roaming pagans; a swarming caravanserai of benighted tribes. Down the long and winding macadamised road which leads to the town from a great plateau on the east, they stream in almost endless succession, and ever in single file, though the highway is wide enough for a dozen abreast, these gangs of untamed adventurers, loaded with African produce and redolent of primeval savagery, but all of them objects of absorbing attention, like denizens of another world. Those sturdy fellows with close-cropped heads and a general appearance of good temper and fearlessness, are Bailundus from the south. Their country is 15 days' journey away, on the highlands near the sources of the Quanza. From the same distance to the north come these Shingas of the Kwango, lithe and graceful, but not over strong, and not too honest either, with their greasy hair in dangling plaits; the skins of leopards and monkeys about their loins, and their nakedness crusted with the dirt of a lifetime. And so, from all around they come: Libolos, Kibalas, Bailundus, Masongos, Bangalas and Shingas; and likewise the demi-semi-civilised men of Ambaka, who have a smattering of figures and a reputation for smartness, and who have been known to trade all the way across the continent, from Angola to Mozambique.

Colonists and
natives.

Here, then, is the explanation of Loanda's prosperity—poured into Dondo by these streaming files of swarthy humanity all the year round, and especially during the earlier months, when the traffic increases to such an extent as to become a source of astonishment even to those who are accustomed to it. The existence of so notable a centre of commercial activity, dependent entirely upon the goodwill of unsubdued tribes, who are as easily excited to alarm as a flight of sea fowl resting on a sandbank, speaks in favour of Portuguese administration. Notwithstanding the old-time slave trade, the natives and the colonists are on the best of terms. Dondo is one of many illustrations of the confidence which exists between them, and of the peaceable effects of being peaceably disposed.

Security of
property.

Practically the town is without protection. Authority is represented by an army officer of the rank of lieutenant, who is

commandant, magistrate, chief of police, postmaster, paymaster and district surveyor, as well as a few other things, and the force at his command is a mere handful of coloured soldiers. Security of life and property, however, seems to be well maintained. Occasionally a drunken savage is carried off struggling and raving to sleep himself sober in prison; or a porter who has attempted to defraud his employer of service duly contracted and paid for, is locked up for a few hours, by way of admonition; but nothing serious occurs, apparently, although everybody is armed and rum and gunpowder are unlimited. A flintlock musket, of the pattern jocularly known as "gaspipes," considered to be worth from 12s. to 15s., forms part of the receipts of almost every native who brings anything in for barter, whether it be a product of the soil or his own labour; and powder can be purchased at every store.

This article is imported in kegs of various sizes, the smallest being convenient little packages containing about 1½ lbs., which sell at 2s. 6d.; and is so prominently a staple commodity that the merchants' stocks are considered to be a source of danger to the town. For security's sake, a great deal is stored in the government magazine; but there is no restriction whatever upon the trade that can be regarded as other than merely nominal, although its regulations are in accordance with international agreement. There is a limit to the amount which each importer may introduce annually; but one trader is as good as another, and there is no monopoly. Declarations are required at the port of entry respecting the place at which the powder is intended to be sold; but a customer is a customer wherever he may hail from. The trade is profitable to the merchants, though the Government levies a duty of 3s. 6d. on every gun, and of 10½d. on every pound of powder.

As to "arms of precision, such as rifles, magazine guns, or breech loaders, whether whole or in detached pieces, their cartridges, caps or other ammunition intended for them," which by the Act of Brussels are prohibited merchandise, they are excluded from the market by the merchants themselves, under a law more efficacious than any devised by signatory Powers. It is found that the Bantu black man is happy with his "gaspipes," and that when he goes forth to shoot he has no desire to drill holes in his game at a mile, but likes to creep up near and produce an impression at close quarters with a handful of slugs. Modern weapons, with their high prices, their bewildering accessories, and their utter uselessness in the absence of proper ammunition, are not in his line.

But Belgian trade guns and German powder are not the only things he comes to Dondo for, of course. Let us see what he gets beside, and how he gets it. Here is a gang of fifteen or twenty, newly arrived. The trader who is bargaining with them requires their labour for the conveyance of coffee, wax, and indiarubber from some branch establishment farther

inland. They are clustered about his door like bees. What they long for most is a lap at the rum barrel which stands with its dripping tap, leaky from incessant use, in a handy position on his counter. By and by the blissful moment arrives, and every man receives about a gill, which he holds in his capacious mouth until the fire has tingled every nerve in his palate; when down goes the spirit in a scorching gulp. And now the bargain has been struck. The men in skins and charms, and dangling greasy hair have undertaken to make twelve journeys, each of two days out and two days in, and to carry, in the aggregate, both ways, so many loads of so many pounds; whilst the trader has agreed to give them a miscellaneous outfit, and to provide them with daily rations of native flour and dried fish, and also with sundry bottles of the all-alluring fire-water, during the time they remain in his service—payment which he estimates at the prime cost of about 25 milreis (4*l.* 10*s.*) a man.

Advertising.

Business concluded, the fun begins. The gang forms into a circle: twenty all but naked sons of nature. Into their midst the trader flings a bundle of cast-off clothing—20 old coats and 20 vests—and tops the heap with as many white cotton shirts and coloured waist cloths. Instantly every man seizes his share, and proceeds to civilize himself, to the accompaniment of a tribal chanty, which as soon as the black heads have emerged from the labyrinthine shirts swings off into march and dance. The pot is now boiling, and the trader keeps up the fire. 20 billycock hats, trimmed with showy bands, produce an increase of swagger and noise. But the real crescendo begins when he hands out 20 parasols of flaming splendour, scarlet and green and yellow and purple; and fluttering lengths of gaudy handkerchiefs, which are immediately utilised as sashes and flags. "What a white man this is, to be sure!" the circle roars in unison, "but won't he give us another drink that we may sing his praises louder?" Of course he will; and to the drink he will add mugs; and to the mugs plates; and to the plates spoons; and to the spoons machetes; and to the machetes a dozen other odds and ends of barter, until the pay is all there, heaped up and running over, with the flint-lock in the back-ground. And then, if the gang be a lively one and the trader liberal with his rum, the full-throated chorus will parade the town in military order, hats a-cock, parasols a-blaze and banners a-flying, and with the aid of a native drum and its booming tremors will excite hundreds to join in the grand finale. This is the African sky-sign and full-page advertisement.

When the entertainment is over, every man makes up a package of what he has received, and delivers it to the trader for safe keeping. They have handled their wages, and are satisfied therewith, and have now to proceed to earn them. Next morning they may be seen in their original garb of crusted dirt and Adamite aprons, with burdens of from 60 to 90 lbs.

weight on their shoulders, toiling up the hot and weary road which leads to the table-land and regions beyond.

These outgoing loads are of the most varied description. They comprise every article already mentioned as imported, means of barter, and also provisions and wine and other supplies for the traders, government officials, managers of estates, missionaries and other Europeans who reside in the neighbouring districts. Now and then they include portions of steam engines; machinery for husking coffee and crushing cane; huge cauldrons for purifying wax, and distilling apparatus.

At the summit of the pass there is a wayside hamlet and Roads. military station, and a few yards beyond, an important bifurcation in the road. One branch—the trans-continental it should be—strikes off in unmacadamised freedom to the east, and, taking the no longer navigable Quanza as a guide, runs out for nearly 150 miles, through a series of villages, stations and settlements, to the flourishing town of Malanji—noted for its trade in indiarubber—and then, abandoning the river, which here comes up in a bend from the south, pushes on for 100 miles more to the frontier post of Kasanji, where, for upwards of 20 years, civilisation has tapered off to a coloured official, accepted on sufferance by the aboriginal Bangalas. In a direct line, this point is almost exactly 350 miles from the city that was founded over 300 years ago. Beyond it, lies an equal extent of unoccupied Angola, including the sources of the Kwango and Kasai; the raided Lunda country; the head waters of the Zambesi, and that fateful streak of delimitation which divides the Portuguese possession from the Congo Independent State. Behind it, ebbs and flows the colonial trade; the ebb bringing nothing but useful products, while every advancing wave lands the rum barrel higher.

The other branch of the road from Dondo is a continuation of the engineered highway which ascends the pass. Bearing to the north, it sets out across the plateau, but soon begins to bungle at gullies and watercourses; and, 30 miles from its starting point, terminates at a collapsed bridge, on the River Lucalla, a tributary of the Quanza.

This highway was intended to connect the port of Dondo with the coffee country, of which the tributary forms the southern fence. Kept in serviceable order it would be an invaluable boon to both planters and traders. Why it is not so maintained is a mystery to the wayfarer, who sees how few repairs are really necessary. With the coffee season beginning, crops plentiful, prices in Europe unusually high, vehicles rotting on their axles, and animals eating their heads off, the situation is sufficiently irritating, no doubt, to mercantile common sense.

Crossing the Lucalla in a canoe, the traveller finds his path Coffee ascending to a seeming chaos of volcanic hills, and almost country immediately he enters a fair, wild, wooded land of towering

heights and echoing glens—the garden of Angola, and a veritable Eden compared with the dreary seaboard. A climbing ramble of three or four hours, amid scenes of refreshing beauty, carries him up to the valley of the highest crater—the loveliest of them all—watered by a perennial stream.

On his way he has seen coffee in blossom and berry, growing in jungle luxuriance, and has had glimpses of white plantation buildings, hidden amongst the green. Here he discovers a similar homestead—the storehouses, shop and dwellings, drying-grounds, engine-room, and distillery of an estate which is managed by two energetic young Englishmen. From a neighbouring summit—part of the crater's dizzy rampart—can be seen the headquarters of other properties in the valleys of Cazengo, which fall off east and west, while to the north extends Golungo Alto, a second volcanic jumble swathed in forest, concealing many more. Beyond again, in the same direction, lies the greater coffee district of Encoji; but that for the present is left unnoticed, as not being included in the strip of Angola, bounded by the Quanza and the Bengo, which is under survey.

Coffee
estates :

Altogether the estates of Cazengo and Golungo Alto number somewhere between 15 and 20. The largest of them—one of eight, which are in the hands of the Banco Nacional Ultramarino of Portugal—was described to the writer by the courteous and hospitable manager-in-chief of the mortgaged group as “six miles long and of breadth unknown,” the map of it which he was engaged upon being then incomplete. Its crop for 1893 was estimated at 214 tons, and for the first time in the history of the property systematic planting had been undertaken, which was expected to result in the addition of 118,000 trees.

Origin of.

Such information must needs provoke inquiry, and it becomes necessary to explain that all these estates have been created either by the appropriation of forest in which coffee was growing wild, or by uniting patches already cleared by natives, and old records exist which prove that many a birthright was bartered for something much less substantial than a mess of pottage. That the value of the holdings might be vastly increased is self-evident. One of the smallest, that which has been mentioned as managed by Englishmen, and which belongs to a British firm, is registered as covering 1,424 acres, but only 464 contain coffee. Of the remaining area, 54 acres are given to cane, for the manufacture of rum, 64 to manioc, as food for the hands, and 1 to drying grounds, thus leaving 841 acres unproductive, except in so far as it yields fuel for the steam-power and distillery.

Management
of.

Then, again, the bean of this indigenous coffee is not only of very poor flavour, but also of very small size, and on account of the height of the trees and their straggling character is often hardly worth the trouble of picking. An acre of coffee, with the plants 6 feet apart and properly cultivated, is considered in other parts of the world good for a crop of half a ton. Under

such conditions the 464 acres above referred to might be expected to bear at least 200 tons, whereas at present they only yield 35. There is no digging or manuring done on any of the properties. The trees are simply cleared of under-growth and pruned a little, in the roughest and readiest manner, and then left to do the best they can with such nutriment as rots on the surface around. But it is easier to indicate possibilities than to attain them. The problem exists in the usual terms of labour and management, and for those who can solve it the reward is fortune. Some idea of its difficulty may be gathered from a hasty glance at the labour market.

Angola offers three kinds of this indispensable article. **Labour :** First, there is that which is found amongst the 14,000 blacks of St. Paul de Loanda, who expect to earn as much in a day as will keep them a week, and have a strong objection to doing much for it. Good wages are not to be grudged to a competent artisan who has years of training in his fingers, whatever his colour may be; but when unskilled labour (in the guise of a lounging, half-naked negro) demands 6s. per day, and gets it, for the comparatively easy work of bagging and stacking coffee, the time has come for a transfer of sympathy. It is the whites who are to be pitied in such a paradise of colour. The town-bred African is a long way out of the **Town-bred.** question as a plantation hand.

Then there is the labour which we have seen in process of **Country bred.** engagement at Dondo. This is good in its natural line, and somewhat cheaper than the other. But above all things it is roving, and would never consent to be tethered in a wearisome round of grubbing and picking at $4\frac{1}{2}d.$ per day, when it can earn from 1s. 6d. to 2s. in undisciplined freedom.

And, finally, there is the kind which the coffee owners actually employ, namely, that of "serviçaes."

With regard to the merits of this labour, we may safely say **Native industry versus estates.** that in spite of its cheapness it by no means solves the problem of making coffee-picking a commercial success. Indeed, figures might be adduced which would show immediately that it costs as much on some of the estates, if not on all, to collect a ton of berries and dry them as it does to purchase the same quantity from the natives outside, already dried and husked. This, however, does not prove that free labour would be more profitable. It only indicates the line on which development should be fostered. Eight-tenths of the colony's product of coffee comes into the market through native industry, and none of the estates have really justified existence. Where they are made to pay they do so not as plantations, but as centres of other business. For example, the estate of which the annual yield is only 35 tons buys more than double that amount over the counter of its shop, and in doing so disposes of a large quantity of general merchandise, and of 8,000 gallons of rum, manufactured on the premises.

The turn-over in wages also counts for something, especially

on the larger properties, where the wages of $4\frac{1}{2}d.$ a day sum up to between 2,000*l.* and 3,000*l.* per annum. There is no compulsion as regards expenditure; but as a matter of convenience the hands buy all they require upon the spot, and prices are fixed so that this may be an advantage to them. Some, however, are occasionally found buying in the nearest village at higher rates. It would be an act of humanity to prevent them from spending their allowance on drink. The sum they receive is just sufficient, with strict economy, to feed and clothe them. What happens when it is wasted may be easily imagined—empty stomachs, mal-nutrition, diseased limbs, and puny children, many of whom would be left to die of starvation if the managers did not take them in hand and see them fed. But the theory prevails that nothing can be done without rum. It is said that if the supply were stopped the hands would run away, the porters would not come in to engage themselves, and that coffee for sale would be taken elsewhere.

Coffee, prices
and profits.

Notwithstanding its inferiority, the coffee of Cazengo and Golungo Alto readily finds a market. In 1892 the total shipment from Loanda, consisting mainly of the crops of the two districts named, amounted to 4,805 tons, valued by the customs at 209,609*l.*, and yielding to the Government a little over 6,000*l.* in duty. All of it went to the Tagus, and all in Portuguese vessels. The returns for 1893 are not yet obtainable; but everybody is of opinion that they will record a considerable increase; and it is a matter of certainty that the profits for the year will mount far beyond the average. The ill wind of Brazil is a favouring breeze on this side of the Atlantic. Coffee which was purchased in Cazengo at $3\frac{3}{4}d.$ per lb., and which cost $1\frac{1}{2}d.$ per lb. to bring to the port of shipment, has already been selling in Lisbon at 7*d.* per lb. The margin is satisfactory, and yet it shows that under ordinary circumstances there must be very little room to depend upon. In fact, the rate of exchange often makes all the difference between profit and loss. The best bargains may be utterly ruined by the vagaries of the unstable milreis, which to-day is worth only 3*s.* $4\frac{1}{2}d.$; whereas 6 months ago its value was 3*s.* $7\frac{3}{4}d.$ For this and other reasons merchants in Portuguese West Africa need a large capital and unbounded patience.

Machinery.

Mention has been made of machinery in connection with the coffee plantations. Nothing of the kind, of course, is used by the natives, unless a wooden mortar and a pestle may be called a machine; but steam-driven appliances for husking and winnowing are found on all the properties held by Europeans. The latest importations have come from the United States. A smart young engineer who could speak Spanish, and who, therefore, easily picked up a little Portuguese, was sent out by his firm to make a tour of the province; to ascertain by personal inspection the requirements of the estates; to make suggestions; take measurements; explain catalogues; and to

offer adaptations in cases where the advertised contrivance did not seem to be all that was desired. Naturally the result was a series of orders. The machinery supplied has not given universal satisfaction; some complain of it bitterly, and others say it is excellent; but whether it is a credit or the contrary to American workmanship, there can be no doubt as to its being a credit to American enterprise. If English manufacturers could only realise what large sums of money they waste in printing and posting catalogues and price-lists, which are consigned to foreign waste-paper baskets as unintelligible rubbish, they would soon find means for ensuring attention to their advertisements. It may not be possible for every firm to send out an agent on its own account; but a group of manufacturers whose businesses do not cut into each other might combine for personal representation all over the world. Their commissioners, however, would have to be men who have received the world's education; who have parted with the stiff-backed English belief that well-made goods at reasonable prices ought to sell themselves, and who know that in some countries neither wares nor prices are half as much studied as the seller's capability of adapting himself gracefully to local customs. American push.

There would be an opportunity in Angola for makers of other kinds of machinery than those employed in coffee cleaning and rum distilling, if the natives could only be induced to collect fibre. Enormous quantities of the *Adansonia* variety exist throughout the whole of the maritime plain; the "tree which looks as if it had elephantiasis" being one of the commonest features of the landscape. Dealers in England are crying out for this article; but they must understand that it is not torn from the trees and carried to the rivers or the railway line without a great amount of toil, and that there are easier jobs which pay much better. The total exports of all kinds of fibre from Loanda in the year 1892 amounted only to 52 tons—worth about 70*l*.

Thus the labour question crops up at every turn. And really it seems as if the difficulty were insuperable. There may be one way through it, but only one. Slavery has been weighed in the balances long ago, and found wanting. Justice must be done, though markets be unstocked. The European Governments who have mapped out spheres of influence should begin in earnest to preserve the African; should settle him on the land and keep him there; should put out of his reach entirely everything deleterious, and encourage him to breed and multiply. When the depletion caused by centuries of slave traffic is made good, and the land begins to swarm with generations born in sobriety, the labour difficulty will be a thing of the past. Labour again, how to provide it.

Of the other chief products of Central Angola—indiarubber and wax—there is not as much to say of general interest as there would be if we could accompany the native collectors and see them at work. Indiarubber and wax. A study of the former article would

carry the curious very far afield. Malanji is the principal center of the trade; but in all probability there is not a man's load of growing rubber within 150 miles of the town, and Malanji has already been referred to as situated nearly double that distance from the coast. Every year the source of supply recedes, and only the bolder spirits dare follow. Bold spirits, however, are not wanting for this kind of labour. Anything which gives the African an opportunity of roaming; of prowling in the forest; of foraging, trapping, and shooting, is employment which he does not decline. 622 tons of indiarubber—the quantity shipped from Loanda to Lisbon in 1892—represent an immense amount of industry. The value of the export was 95,826*l.*, of which sum we may suppose that half at least went to the natives, seeing that competition has lessened the profits of trade. One would like to know how much good that 47,000*l.* odd did them, and what there is to show for it at the present time.

It is estimated that the returns for 1893 will record a decrease of indiarubber, although there was more exported during the previous year than in 1891. Wax will probably remain at about 250 tons, with a value of 17,000*l.*

And now, having looked around from the summits of Cazengo, we leave the coffee district for an entirely different kind of country. Following the stream which waters the uplifted valley of the crater, a forest pathway winds out into one of the long sounding glens which fall off to the east, and then merging into a broad woodland drive, sweeps round to an ascending avenue of palms and rose-apples, extending unbroken for more than a mile, lofty and columned, with over-arching fronds, like the aisle of some vast cathedral. Beyond the homestead of the great estate of which this is the noble thoroughfare, are more palm trees, more rose-apples, more tropical luxuriance on every hand, more wooded slopes and shady hollows; and then, all at once, 12 short miles from the point of departure, the scene changes. The garden of Angola is left behind, and before us lie its pasture lands, the wide valleyed acres of Ambaka.

Ambaka.

This is the home of the wandering native traders who have been mentioned as sometimes crossing the Continent to Mozambique. It is an open, fertile, rolling country; is fairly healthy, abounds in cattle, and, with proper management of its numerous streams, would grow anything. In fact, Ambaka might fill the land right down to the sea with endless supplies of wholesome, fresh food.

An idea exists that some such beneficent change will naturally take place as soon as the new railway erects its last station upon one of the bare hillsides of the district. But there is nothing in progress which justifies the hope. Provisions are as dear in Ambaka as they are on the coast, and are likely to remain so a very long time. For two reasons, of which the first is that the natives will not part with their cattle except for slaves. When asked to take money as payment, they reply

that they have more of that stuff than they know what to do with. In spite of their trading instinct, therefore, and the faint tincture of civilisation which distinguishes them from their neighbours, it is evident that the development of the country will be delayed for generations if left in their hands. The other reason is the dominant ambition of every white man either to become a merchant or to own a distillery.

Without a doubt, however, the railway to which reference Railway. has been made will realise many of the hopes which are fixed upon it. It will not work miracles in human nature, but it will reduce the expense of transporting coffee to the coast from 1½*d.* per lb. to about ¾*d.*, provided that the owners of estates and local dealers can find means of getting the produce to the line economically, and will for ever keep out of their account books such astounding items as 7*l.* 10*s.* for the carriage of a barrel of cement worth 14*s.* Well may they long for the line to be completed. Nearly 8 years have elapsed since work on it first began, and the terminus is not expected to be reached before the close of 1895. Dividing the distance by 9 gives an average advance of 125 yards per day, which cannot be called a brilliant achievement; but brilliant achievements in Africa generally end in few of the achievers surviving.

The gauge of the line is metre, and the cost of construction has been at the rate of 4,182*l.* a mile. As to the quality of the work, some people consider that it ought to have been better for the money, and others complain of the material, which is all of Belgian manufacture, as being of very poor quality. But when everything bad has been said that is possible, and criticism has exhausted itself, there is still plenty of room for all concerned to rejoice and be thankful. Trains are now running regularly over 162 miles of the total projection of 230 miles, and the first load of coffee was brought down a few weeks ago. Before the next crop is ready for transport Cazengo and Golungo Alto will have the permanent way laid straight between them.

Reckoning the milreis at par, we find that the traffic receipts have increased from 3,445*l.* in 1889 to 11,886*l.* during the first six months of 1893, thus declaring an annual revenue of 23,772*l.*, before the line has reached the districts for the carriage of whose produce it was mainly planned. And yet the rates are exceedingly reasonable, both for passengers and goods. The third class traveller is charged less than 1*d.* a mile, and the second only three times as much, while a first-class passenger and a ton of coffee are considered equivalents, each being tariffed at 4*d.* For some kinds of goods, such as building materials, the rate is as low as 2½*d.* per ton.

In its latest report the company directs the attention of shareholders to the Loanda customs receipts, which have steadily risen year by year, omitting that of the financial crisis in Portugal, from 38,000*l.* in 1886 to over 142,000 in 1893; and by implication it takes credit to itself for this very gratifying prosperity. Undoubtedly enterprise encourages enterprise, but

the Government income had been on the increase for 3 years before the railway earned its first 500%. It is not always the horse that moves the cart, even when the horse is an iron one. To say more for the line than can be endorsed by those who see it in operation is neither wise nor necessary. As a speculation it is good enough to stand on its bare merits, and cannot fail to reward its promoters, if they will only support a continuance of the economy which was begun under the present management. As an improvement to the colony its value is inestimable, and there is no one worthy of the name of either patriot or friend who does not sincerely regret that the company is unprovided with means for carrying the work on to the frontier.

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N^o. 1388.
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AND FINANCE.

PORTUGAL.

REPORT FOR THE YEAR 1893
ON THE
TRADE OF MADEIRA.

REFERENCE TO PREVIOUS REPORT, Annual Series No. 1226.

*Presented to both Houses of Parliament by Command of Her Majesty,
JUNE, 1894.*

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Reference to previous Report, Annual Series No. 1226.

PORTUGAL.

MADEIRA.

Consul Keene to the Earl of Kimberley.

My Lord, Madeira, May 14, 1894.
I HAVE the honour to transmit herewith my Report on the
Trade and Commerce of Madeira for the year 1893.
I have, &c.
(Signed) WILLIAM KEENE.

Report on the Trade and Commerce of Madeira for the Year 1893.

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NOTE.—All Portuguese money has been converted in this report at the rate of
4\$500 reis per l.
(1781)

RETURN of all Shipping at the Port of Funchal during the Year 1893.

ENTERED.

Nationality.	Sailing.		Steam.		Total.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.
British	13	4,076	386	692,317	399	696,393
Portuguese... ..	38	7,566	95	136,853	133	144,419
German	...	...	75	129,176	75	129,176
Danish	...	...	10	18,345	10	18,345
Dutch	1	180	11	11,399	12	12,579
Other countries ...	19	13,170	41	87,464	60	100,634
Total	71	23,682	618	1,088,294	689	1,111,976
.. for the year preceding ...	86	23,972	696	1,060,517	702	1,084,489

CLEARED.

Nationality.	Sailing.		Steam.		Total.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.
British	13	3,676	386	692,897	399	696,573
Portuguese... ..	38	7,190	94	143,204	132	150,394
German	...	...	75	144,131	75	144,131
Danish	...	...	10	18,243	10	18,243
Dutch	1	180	11	11,999	12	12,179
Other countries ...	19	13,743	40	86,204	59	99,947
Total	71	23,169	616	1,089,648	687	1,113,867
.. for the year preceding ...	81	18,568	687	999,726	668	1,018,294

The foregoing tables show an aggregate of 1,376 vessels entered and cleared at the port of Funchal during the year 1893; this number is 6 in excess of that given in the previous year's return. In British shipping there is to be recorded an increase of 14 vessels, but a decrease of 49,592 tons, as compared with 1892.

Of the total number of vessels entered and cleared 58 per cent. were under the British flag.

Imports and Exports.

The following tables give a return of the principal articles imported to and exported from Madeira, with their value, for the year 1893-92:—

RETURN of Principal Articles of Import to Madeira during
the Years 1893-92.

Articles.	1893.		1892.	
	Quantity.	Value.	Quantity.	Value.
	Tons.	£	Tons.	£
Coal	55,799	31,975	70,894	80,262
Dry goods	93	15,808	95	17,230
Maize	6,420	33,006	3,836	23,613
Wheat	3,412	25,928	2,307	18,259
Rice	469	4,503	433	4,173
Molasses.. ..	64	468	587	3,757
Other articles	..	44,947	..	47,195
Total	66,257	156,635	78,152	194,489

RETURN of Principal Articles of Export from Madeira during
the Years 1893-92.

Articles.		1893.		1892.	
		Quantity.	Value.	Quantity.	Value.
			£		£
Wine.. ..	Pipes ..	5,168	150,947	5,077	146,009
Embroidery	Tons ..	11½	2,011	7	1,429
Vegetables (green) ..	.. ..	82	932	64	560
Fruits (green) .. ..	.. ..	1,594	5,964	958	4,637
Wicker work.. ..	.. ..	133	1,944	75	841
Cabinet work .. ..	.. ..	2½	160	1	62
Other articles .. ..	.. ..	..	57,896	..	9,463
Total	Pipes ..	5,168	219,854	5,077	163,001
.. ..	Tons ..	1,822½		1,105	

TABLE showing Total Value of all Articles Exported from, and
Imported to, Madeira, from and to Foreign Countries, during
the Years 1893-92.

Country.	Exports.		Imports.	
	1893.	1892.	1893.	1892.
	£	£	£	£
Great Britain	97,548	65,047	98,090	100,345
Russia	2,860	5,848	59	63
Germany	24,580	45,012	5,606	5,807
Morocco.. ..	81	76	11,510	11,067
France	..	..	1,330	1,745
America.. ..	610	317	28,354	28,782
Other countries.. ..	66,185	4,647	11,720	11,640
Total	191,864	120,947	156,669	159,449

High duties.

In my last report I mentioned that the excessive high duties had caused a considerable falling-off in the importation of dry goods, and that foreign competition with the inferior goods manufactured in Portugal was impossible, and that in the local shops there was a total absence of the better class of goods.

This state of things continues.

Dry goods.

In 1892 the importation of dry goods was 117 tons less than in 1891. Though the 2 tons and 1,422*l.* value decrease in 1893 is in itself insignificant, it goes to show that the Portuguese factories have been unable to make up any portion of the 117 tons decrease of 1892, or, in other words, to supply the better class of goods.

Flax has been more largely cultivated in the island of late years. From this the country people make a certain amount of rough sheeting and towelling of a finer quality. Those who do not make their own towelling and sheeting buy an unbleached grey calico, manufactured in Portugal, and sold locally at from 3*d.* to 7*d.* per metre.

The import duty on calico from foreign countries is 9½*d.* per kilo.

In the rural districts there is also a certain amount of cloth made from island-grown fleece; this fleece formerly was mixed with shreds of coloured baize imported from England, but as the baize now pays an import duty of 8*s.* 6*d.* per kilo., it is little used.

The duty on the importation of molasses has killed the trade with British Guiana in this article.

In 1891 there were 1,919 tons imported, the duty then being 23 reis per kilo.; in 1892 the duty was raised to 60 reis per kilo., though in the same year 587 tons were imported. This, however was not subject to the new tariff, the effect of which is seen in the return of 64 tons for 1893.

The protection of the island-grown sugar-cane is put forward as a reason for the prohibitive duty on molasses. Be this as it may, the amount of neutral spirit, for the treatment of wine, produced from the sugar-cane, can hardly be sufficient for the demand, seeing that spirit has been imported from Hamburg and from the Azores.

The export of wine has been equal to the average of the last few years, the chief buyers being France, Russia, and Germany.

The export of wine to the United Kingdom was 81,722 imperial gallons in 1892, and 71,325 imperial gallons in 1893, or a decrease of 10,397 gallons.

Fruit and vegetables.

In the export of vegetables and fruit there has been a steady increase during the last few years, which increase has been fully maintained during the past year.

It is again necessary to state that a true return of this export cannot be arrived at, but it is beyond doubt that the amount exported is several times more than that given in the foregoing table.

In all other exports there is a slight increase to record, though not worthy of special comment.

The total value of all exports for 1893 was 191,864*l*. Of this amount Great Britain is credited with 97,548*l*., or 32,501*l*. in excess of 1892.

The value of all imports is given at 156,669*l*. Of this sum Great Britain claims 98,090*l*. Predominance
of British
trade.

From these figures it is evident that during 1893 (in spite of the prohibitive duties) Madeira was dependent on trade with Great Britain to the extent of 195,638*l*., as against 152,895*l*. with all other countries.

The chief trade of the island is carried on by resident British merchants.

The wine, coal, vegetable and fruit trades being virtually entirely in their hands, as is also nine-tenths of the manufacture of sugar and neutral spirit.

The banking business is also to a great extent carried on by English firms, and all the large hotels are owned and managed by Englishmen.

It is probable that a larger proportion of the imports might be supplied by Great Britain had our exporters the same zeal in sending commercial travellers with samples of goods, as Germany and other countries display. The British commercial traveller is conspicuous in Madeira by his absence, though, I am told, he pays occasional visits to the adjacent islands, whereas travellers from other countries appear at regular intervals, and book many orders that might be competed for and obtained by English firms were they represented on the spot.

The British exporter certainly employs an inexpensive, though inadequate, means of conveying to foreign customers information regarding British products. I refer to illustrated price lists, buyers' guides, directories of manufacturers, &c., which have recently been very largely distributed about the world.

This means of advertising is of infinitesimal value as compared with the persuasive power of the trained foreign commercial traveller.

Vintage.

The vintage of 1893 was not a very satisfactory one. The quantity was short of the average on account of the windy and rainy weather during the time of spring growing, the consequence of which caused prices to rise. This, however, has encouraged growers to further plant phylloxera-resisting vine slips. All the new plantations are looking well, and a good vintage is anticipated for 1894.

Sugar-Cane.

The growth of sugar-cane has considerably increased of late years, the crop of 1893 being abundant and of good quality. This, however, has not had the effect of reducing the price of sugar, which is sold in the local shops at from 1*s*. to 1*s*. 6*d*. per kilo.

Public Works.

Railway. The railway from Funchal to the Mount, which has been in course of construction for some time, has been partly opened for traffic, and it is expected that the whole length will be opened during 1894. This is the first railway ever constructed in Madeira, and is on the same principle as the Righi Railway.

The total length of the line is 24,000 metres, the deviation being 25 per cent.

The total cost, without counting rolling stock, is estimated at 32,400 milreis (7,200*l.*); the total capital is given at 148,456\$538 reis (32,990*l.*), of which 112,500 milreis (25,000*l.*) will be spent, plus 67,000 milreis (15,000*l.*) as compensation.

It would be premature to pronounce an opinion as to whether this railway will be a source of benefit to Madeira and of profit to the shareholders or not, though I believe so far it has given satisfaction in both respects.

Breakwater. The Loo Rock breakwater is in course of re-construction, the estimated cost being 27,000*l.*, which, added to the original cost of 100,000*l.*, makes it a very expensive work, the utility of which, I am afraid, is out of all proportion to the outlay.

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DIPLOMATIC AND CONSULAR REPORTS ON TRADE
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REPORT FOR THE YEAR 1893
ON THE
TRADE, &c., OF THE CONSULAR DISTRICT OF
Oporto.

REFERENCE TO PREVIOUS REPORT, Annual Series No. 1308.

*Presented to both Houses of Parliament by Command of Her Majesty,
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1383. Naples	1½d.	1443. Nagasaki	1d.
1384. Constantinople	2d.	1444. Madrid	2½d.
1385. Buenos Ayres	5½d.	1445. Malaga	2½d.
1386. Caracas	1½d.	1446. Rotterdam	1d.
1387. Vienna	1½d.	1447. Port Said	1d.
1388. Madeira	½d.	1448. Sofia	2½d.
1389. Panama	1½d.	1449. Warsaw	1½d.
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Reference to previous Report, Annual Series, No. 1308.

PORTUGAL.

OPORTO.

Captain F. Hay-Newton to the Earl of Kimberley.

My Lord, Oporto, July 10, 1894.

I HAVE the honour to transmit, herewith inclosed, a Report on the Trade and Commerce of this Consular District for the year 1893.

I have, &c.
(Signed) F. HAY-NEWTON.

Report on the Trade and Commerce of the Consular District of Oporto for the Year 1893.

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" E.—Return of shipping, harbour of Leixões	23, 24
"	24

* NOTE.—In this report the figures are given incurrency, as, under present circumstances, their conversion into sterling would be all but impossible. For any one desirous of information I give the following quotation:—

1l. = 4\$500 reis normal price.
1l. 6 000 reis present price.

This rate varies from day to day.
(1832)

General Remarks.

The year 1893 has in no way assisted to raise this country from the difficulties into which it has fallen of late years, there being an unfortunate concatenation of circumstances (which it would be out of place to enter into here, though thoroughly well known to every one) which holds it down and prevents it from again becoming, as it ought to be—with its rich soil, its good climate, its long seaboard, its steady and hard-working people—one of the most prosperous countries for its size in Europe.

The industrial
tax.

The proposed increase of what is called the “Contribuição Industrial,” or tax on industries, trades, and professions, has caused great excitement throughout the country. This tax, if it becomes law in its present form, will largely increase the amount hitherto paid by the wine shippers, and will also so seriously affect the industries throughout the country as possibly to oblige some of the firms at present employing a large number of hands to close their works, the duties being actually in excess of the profits, thus not only nipping in the bud the beginning in this country of a promising trade, but also throwing out of work a number of people, principally young women, who are wholly dependent on these factories, at a time when there is very little prospect of their being able to obtain any other employment. One firm alone, which has a factory at Lisbon and another at Oporto, and which this tax would hit very heavily, employs more than 1,000 Portuguese, besides a large number of English as heads of departments. Fortunately, however, after several excited meetings had been held throughout the country, among others one at the Associação Commercial at Lisbon, and in consequence of which the Associação was summarily dissolved, the Government has at length so far given way as to promise to again take this tax under its consideration.

Since the above was written a new decree has been published containing what it had been hoped would be modifications in the industrial tax, and although certainly in some cases alleviation is given, in others, notably in cases affecting British interests, an enormous increase is observable. This refers to agencies of British banks and insurance companies, and, in the case of the latter at least, the taxation is such as to be, in the opinion of those interested, prohibitive.

The wine
crop of 1893.

Wine being the principal article of production, and by far the most important article of export, the general failure of the crop last year naturally tends to upset the entire economy of the country.

It was greatly feared, owing to mildew, the sudden changes of temperature in the spring, followed by great heat which dried up the grape before it had arrived at maturity, that, even if the quality were good, the quantity would be small, but it was not expected there would be such an universal failure of the crop, not only in the important district of the Douro, but throughout the

whole country. Had the failure been restricted to the Douro district no great harm would have, perhaps, resulted, as by the falling-off in consumption of the lower qualities of port wine, owing to strikes and other causes, by the artisans and miners in England, shippers were fully stocked and general dulness has prevailed, but when the failure extended throughout the whole country matters took a more serious turn. A proposal was brought forward, in order to keep down prices and tide over the bad times, that the Government should be asked to temporarily reduce the duties on Spanish wines imported into this country, but this at once raised such opposition throughout the country, as being harmful both to the wine producer and exporter, that the idea was put aside as impolitic.

The consequence was that the usual flow of wine to the Brazils was practically stopped consequent on the inevitable rise in prices, and "consumo" wines, which in ordinary years cost some 15 milreis or 18 milreis a pipe, rose to 50 milreis or 60 milreis. Some few years ago, before the phylloxera had devastated such large tracts of country, this failure in the wine crop would not, probably, have been so much felt, as although prices would inevitably have risen there would still have been, owing to the large area then under vines, a sufficient supply to meet the demand, but now, when even in a very good year the supply is scarcely sufficient for home consumption, together with the yearly-increasing demands to Brazil, a general failure as in 1893 is productive of the most lamentable results to the country.

In order to meet the demand in Brazil, the shipper had to seek his supplies elsewhere, and thus found himself in consequence obliged to resort to Spain. Large quantities of Spanish wine passed through Portugal in transit, empty barrels being also shipped in great numbers from this country to Spain to be there filled with Spanish wine, and, with Portuguese marks, re-shipped to Brazil.

As it must be some considerable time before wine in any sufficient quantity can be again exported from Portugal, I greatly fear that the outcome of thus allowing Spain to get a foothold in Brazil may be that the public taste will become accustomed to the Spanish wines, and, finding that they can be exported at a much lower price, this large and increasing trade (one of the few of any importance remaining to Portugal) will become alienated. Thus much capital, a large business, and the carrying trade resulting therefrom may possibly be permanently lost to this country, rendering its financial state even more deplorable than it is at present.

The Government is apparently waking up to the danger which Government threatens the country, a decree having been lately published, ^{decree.} stating, among other matters in connection with wine culture in Portugal, that a special commission is to be sent out to Brazil and the neighbouring countries for the purpose of studying the commercial conditions with regard to the importation there of Portuguese wines, together with the best means of neutralising

the competition of other countries, the class of wines most in demand, the imitation and adulteration of Portuguese wines, &c. District commissions are also to be formed in this country, who are to report to a central commission, which it is intended should act as a medium for putting the foreign merchant in direct communication with the wine grower.

Brandy.

Another question seriously affecting the wine trade here at the present moment (and this is one which more directly affects the better wines of the country, such as those made in the Douro district and known in England as port) is that, in consequence of the total failure all over the country of the vines from which the "consumo" or common wines are made, the distillation of brandy has ceased (it requires 7 pipes to 8 pipes of ordinary wines or about 5 pipes of the more luscious wine of the Douro to make 1 pipe of brandy). It would, therefore, surely, have been good policy to have slightly reduced the large duty at present levied on Spanish brandies; this would have to a certain extent discounted the great loss to the farmer by the general failure of his 1893 crop, and would also have prevented the too free use of Berlin or other spirit, which, on account of its comparatively greater cheapness, is only too likely to occur; but, unfortunately, this again would have affected certain powerful interests in the Azores Islands from whence is imported large quantities of spirit (distilled from sweet potatoes or imported maize). The distillation of spirit in the islands is practically a monopoly, and, as is the case generally with all monopolies, the spirit, which at first was good, has greatly fallen off, being now so badly rectified that it is practically useless for first-class wines; it is, however, I understand, being very much used by the "Tabernos," together with the juice from the elderberry and other deleterious ingredients, to fill up the void in the "consumo" wines occasioned by the failure of the crop. Raisins imported from Spain are also being used by certain unscrupulous persons, these added to cheap, light, inferior wines impart to them a fictitious character, and allows of their being passed off to the ignorant or unwary at prices which would be impossible for a genuine article.

Adulterations.

Banks.

Owing to the very critical state of those Oporto banks which, as mentioned in last year's consular report, had formed themselves into a syndicate for the construction and working of the Salamanca railway, they, some time ago, appointed a committee to solicit assistance from Government to enable them to get out of their difficulties.

The distress of the Oporto banks arose from the fact of their having large amounts of capital locked up in this railway, which does not pay, and the cost of which enormously exceeded the estimates, and also in a loan made some years ago to the Government, from whom for some time past they have been receiving no interest, it having been withheld in consideration of advances made in connection with the line. The then Minister of Finance promised such assistance as the state of finances would permit, but made it a condition precedent that the banks forming the

syndicate should amalgamate, so as to form two establishments only. This was not at first accepted by all the banks, but a short time ago the Government was again approached, and, as a result of the negotiations, the banks, with one exception, have now joined their businesses together into one concern.

The assistance to be rendered by Government consists in favourable terms of settlement of the advances made, and the repayment of the loan made by the banks, which is to be transferred to the Bank of Portugal, and in virtue of which repayment the newly formed bank will receive the sum of about 2,500,000 milreis.

In making the accounts with the Government, it was found that the indebtedness to the State amounted to about 4,500,000 milreis, and the matter of the loan having been disposed of separately as above mentioned, that of the advances for the railway, which is now being worked by Government, will be settled by means of the retention by Government of the subsidy originally granted for building and working the railway. The amounts due to Government on this head are:—Subsidy of 135,000 milreis from 1882 to 1889, and of 270,000 milreis from 1889 to the present day (the increase for the latter period is due to the fact that it also has relation to charges in connection with the harbour of Leixões). The debt would be thus reduced by about 2,500,000 milreis. The future annual subsidy of 270,000 milreis is to be withheld for payment of interest on the advances made and of the deficit in the working of the railway, the balance to go towards a sinking fund for the extinction of the capital sum.

The general unsettled state of the country arising from so many causes has naturally had the effect of causing a further drop in the exchange, or, in other words, increasing the premium on gold.

At the commencement of the year the rate on London was about 42*d.* per milreis, but in the month of April it rose to 44*d.* per milreis, this was the highest rate throughout the year, and sovereigns were consequently not worth more than 5\$450 reis, or at a premium of 950 reis each, equal to 21 per cent. This rate was maintained until the middle of July, when it began to drop steadily, and by the middle of August the ruling rate was again 42*d.*, it continued to fall steadily up to the end of the year, business done December 31, 1893, under 41*d.*, thus making the value of the sovereign equal to 5\$900 reis, or 31 per cent. premium.

The only reason I can ascribe for the rise in April is the following. It being well known that the Government has to provide for its quarterly coupon due abroad, speculators in exchange buy up, in anticipation, all bills and sovereigns that are on offer, with the object of supplying the Government with the necessary funds to meet its requirements abroad. Last year, however, the April and July coupon was, I believe, provided for by two or three banks in Lisbon, who found the necessary funds in London, Paris, and elsewhere, so that when it became known that the Government was not in the exchange market, these speculators seeing their

expected profits not forthcoming became alarmed, and not being able to hold their stocks had to sell off at any price, and the banks who had advanced the money to the Government counterfeiting indifference, quite a panic in exchange was for a short time the result.

For the present year, I am informed, the Government has adopted a different policy, viz., to buy every fortnight about 16,000*l.*, and by this means avoiding any great oscillations in rates at any fixed period, as was the case last year.

Statistics.

As has been frequently repeated in reports from this Consulate, no official returns are published at the custom-house, but are all transmitted to Lisbon to be embodied in the general statistics of the kingdom, and it is not only difficult to procure official information on any subject, but when procured, it cannot in all cases be thoroughly relied on; as has been done in previous years, therefore, I have had to depend chiefly on information obtained from unofficial sources, or from extracts privately procured for me, on payment, from the custom-house, consequently the figures must only be taken as approximately correct.

The custom-house last year altered their classification of goods, thus rendering comparison with previous years of amounts, except with certain specified articles, impossible. They also, in the month of April, 1893, began to calculate the value of the pound sterling at 58,400 reis, instead of at 48,500 reis at which rate all calculations had previously been made, which therefore compels me to quote the values in currency as given by them, this change will no doubt also account for any apparent discrepancy in values as compared with previous years quoted.

Fortunately, however, an annual consular report which is intended principally to assist in the furtherance of British commerce abroad, and to supply useful information to producers at home, is here of less importance than probably in any other country for the following reasons:—

The import duties here on all foreign goods have lately become so prohibitive, being in many instances two or three times the initial cost, that with the exception of absolute necessities very little is now being imported from Great Britain.

There are many British commercial houses here who are always ready to follow up the slightest indication of the market, though the unfortunate supineness of the producer at home too often causes the opportunity to be lost to Great Britain, and I must here remark that the British merchant at home is, in his manner of working the foreign markets, very much the inferior in many ways of his foreign competitor, who is daily cutting the ground from under his feet.

Trade and Commerce.

Trade marks.

Articles of all kinds imported from Germany or made in this country, but bearing well known British marks, are openly exhibited, and, although generally very inferior, they obtain, from their very cheapness, a ready sale.

TABLE showing Real or Declared Value of Imports and Exports for the Years 1892-93.

Year.					Value.	
					Imports.	Exports.
					Milreis.	Milreis.
1892..	..	..	..	..	10,068,200	14,391,536
1893..	..	..	..	..	13,456,739	11,684,449

The increase in value of imports may be accounted for by the large increase in the import of cereals in 1893 over 1892, see Appendix B. Whereas the decrease in value of exports may possibly be accounted for in the large decrease in the export of wine, as mentioned in another part of this report.

REVENUE of Oporto Custom-House for 1892-93.

Year.					Amount.
					Reis.
1892..	..	..	..	..	4,539,502\$968
1893..	..	..	..	..	6,037,111 249

Imports.

As regards manufactured goods from Great Britain, of which small quantities are still imported, perhaps the following short summary may be useful to the producer at home.

These formerly came from Manchester in large quantities, Grey calicoes. unfortunately this business has entirely ceased owing to the native factories now supplying the country, and the new feature is that not only have they cut out the Manchester trade in Portugal, but, owing to the good and pure cloths which they make, they have within the last year been exporting to Africa in considerable quantities, the greater part being shipped to the West Coast. The reasons the Portuguese greys are so well made is; firstly, they use nothing but the best and newest machinery; secondly, they bring over the best foremen from Lancashire.

All the old fashioned designs are completely unsaleable, as they are now printed in Lisbon. Printed calicoes. New designs both in style and cloth still meet with a sale, novelties which are artistic and neat will meet with a good sale. The reason the printed calicoes from Alsace are so readily sold in this country is that the goods supplied are always new, varied, and artistic in design, and beautifully printed.

Bleached goods are now done in this country, but some classes Bleached goods. are still imported.

White pures.

White pures are also imported for dyeing and printing, the heavy cloths are, however, made here.

Bradford goods.

There is a demand for the lighter cloths which pay a less duty, those made of all wool are preferred to mixture.

Linen and jute goods.

Yarns still continue to be imported, but the unbleached and bleached linen yarns come mostly now from Germany, as they are cheaper and better made.

Let me here warn Englishmen coming out to Portugal to be careful as to the contracts they enter into; the length of engagement, travelling expenses out and home, &c., being clearly specified. Instances having arisen of men being engaged as foremen, and who, at the end of a year, have been dismissed as being of no further use, everything having been learnt that they were capable of imparting, the Portuguese being very quick to learn.

Several new factories have been started in this country which are doing well, where they have not been too heavily handicapped at the commencement. The Portuguese is most methodical in his work, wages are very low, and trades unions and the strike curse are as yet unknown.

There is, however, no reason why English cloths should not be sent in larger quantities to Portuguese possessions in Africa, attention being drawn to the following points:—

1. To make the widths required.
2. To cut the pieces in small or large lengths as required.

3. To make the greys well, and without too much size; the grey calicoes ought not to be much pressed as it spoils the appearance. It should also be remembered that in the African trade goods are bartered.

RAW Cotton in Bales. ..

Country.	Quantity.		Value.	
	1892.	1893.	1892.	1893.
	Kilos.	Kilos.	M. rees.	M. rees.
Brazil	3,185,678	4,326,005	794,519	1,320,898
England	1,053,258	1,897,442	263,270	431,204
United States ..	905,392	1,292,746	178,731	297,409
Other countries ..	2	527	5	171

The reason, I believe, that cotton is imported in larger quantities from Brazil than from elsewhere is, that most of the machinery here is adapted for Brazilian cotton.

Bacalhau.

Bacalhau or dried cod-fish is the principal article of consumption in this country, there being an average monthly consumption of 20,000 cwts., and which sometimes rises, as has been the case during the last 6 months, on account of a reduction in price the result of a very prolific year in Norway, to 25,000 cwts. per month.

This used to be at one time the largest market for English fish, but latterly the Norwegian has been cutting it out, both on

account of greater cheapness and more careful curing, although the original English fish is better.

The Newfoundlander declares he can only work for (roughly) 19s. per cwt. c.i.f., whereas at this price the Norwegian can undersell him by fully 3s. per cwt. The result is, that not only is the English cure being knocked out of the market here, but this is also the case in all the other European markets.

Year.	Quantity.		
	Newfoundland.	Norwegian.	Total.
	Cwts.	Cwts.	Cwts.
1891	131,632	96,751	228,383
1892	121,620	93,837	215,457
1893	101,252	159,216	260,468

NOTE.—The import duty per cwt. is 2\$030 reis.

RICE.

Country.	1892.		1893.		Rice.
	Quantity.	Value.	Quantity.	Value.	
	Kilos.	Milreis.	Kilos.	Milreis.	
Great Britain	4,931,932	249,555	5,661,577	271,549	
Germany	4,214,361	198,804	4,290,928	203,292	
Total all countries ..	9,315,580	457,294	10,145,782	484,724	

Although, as stated in the last report from this Consulate, rice from Germany is considered better milled and there is a greater regularity in the weight of the bags, still the import of rice from England is annually increasing, while that from Germany is annually decreasing. This can only be accounted for by the fact that only the superior qualities of rice are exported from Germany, and that since the increased import duties, the people, not being able to pay the higher price, have to content themselves with the inferior qualities, which now cost them as much as did formerly the superior quality.

SUGAR.

Country.	1892.		1893.		Sugar.
	Quantity.	Value.	Quantity.	Value.	
	Kilos.	Milreis.	Kilos.	Milreis.	
Great Britain	4,146,508	257,369	4,961,972	302,895	
France	2,005,717	129,083	1,368,023	85,508	
Holland	420,695	29,718	1,157,803	85,466	
Germany	1,642,197	108,793	1,105,244	73,233	
Total all countries ..	9,804,905	639,685	10,515,366	678,116	

The total annual importation for the last 10 years shows very slight fluctuation.

The sugar imported is principally just under type 20 in the Dutch scale, the import duty being less. This is treated in this country before being offered for sale. A very small quantity above type 20 is imported, principally by private individuals.

Mineral oils.

MINERAL OILS.

Country.	1892.		1893.	
	Quantity.	Value.	Quantity.	Value.
	Kilos.	Milreis.	Kilos.	Milreis.
United States	6,263,265	284,083	5,457,111	246,413
Great Britain	..	..	11,459	1,206
Germany	2,950	80	126	6
Total all countries ..	6,266,301	284,176	5,468,676	247,727

Although the cost here for the best petroleum is 15 milreis for 150 kilos. (150 kilos. cost 5 milreis free in Oporto; duties, 10 milreis), it is far from being of the best quality.

Butter.

France last year took the first place, until then held by Great Britain.

Country.	1892.		1893.	
	Quantity.	Value.	Quantity.	Value.
	Kilos.	Milreis.	Kilos.	Milreis.
France	11,040	5,247	16,029	7,710
Great Britain	13,934	10,456	12,377	7,048
Total all countries ..	26,772	16,422	28,647	14,887

The making of butter in this country has of late years very much improved, and really good fresh butter can now be bought at the shops for about 1\$200 reis the kilo., made on the best principles and in the cleanest manner. A common quality can also be bought for about half this price.

Coal.

The importation of coal in 1893 fell off as compared with 1892 to the extent of about 15 per cent. This may be attributed to two causes—(1) the high prices asked for coal during the strikes in England, which made consumers in Portugal use other sorts of fuel; and (2) the increase in the manufacture in this country of patent fuel, which is partly made of coal dust imported from England and partly of Portuguese coal. The Portuguese-made patent fuel is being largely used at different mills, and for cooking purposes. One or two Portuguese anthracite coal mines are now being worked, and this coal is taking the place of English coal to some extent. Coal from the north of Spain has also been introduced into Portugal.

TABLE showing Coal Imported for 1893.

Description.	Quantity.
	Tons.
Welsh coal	40,000
Newcastle coal	35,000
Scotch and other coal	15,000
Total	90,000

Other chief articles of import are (see Appendix B):—

There was a very large increase last year on the importation of Grain. wheat, owing to the bad harvest.

The flour which figures in the appendix as imported in 1893 was actually imported by the State in 1890, the duties having been paid last year.

This comes chiefly from Great Britain, the total amount imported in 1893 being 2,446 kilos., as against 1,683 kilos. in 1892.

Margarine, or
other
imitations of
butter.

VELOCIPEDES.

Article.	Quantity.	
	1892.	1893.
Velocipedes	163	725

“Other carriages” are also classed under this heading, the number imported, however, being purely nominal.

Articles.		1892.		1893.	
		Quantity.	Value.	Quantity.	Value.
			Milreis.		Milreis.
Clocks		1,127	..	4,859	..
Watches		1,524	..	6,057	..
Pianos and other musical instruments		2,361	..	4,591	..
Staves		2,137,667	..	2,214,206	..
Skins or leather, raw or prepared ..	Kilos. ..	753,660	220,600	733,128	329,200

The following is the amount of German spirit imported during Spirit. the last 3 years:—

Year.					Quantity.	Value.
					Litres.	Milreis.
1891..	..	..	..	..	26,474	5,270
1892..	..	..	..	..	601	140
1893..	..	..	..	..	583,386	53,922

Spirit is being largely used for the inferior qualities of port wines. Even this, however, owing to the heavy import duties, and the stoppage of spirit rectified in this country owing to the prohibition by the Government of the importation of maize, is at an almost prohibitive price. Good Berlin spirit about 68° Sykes o.p. costs about 150 milreis a pipe, as against foreign brandy at about 34° o.p., costing 155 milreis, a little more or less.

An attempt is being made this year to grow sweet potatoes for distillation, but with what success remains to be shown.

**Other
imports.**

Emery paper, iron wire (of which a large quantity is imported), bottles, hardware, pearl buttons, and printing papers are imported chiefly from Germany, Austria, France, and Belgium; iron hoops, bars, &c., from Great Britain.

For total value of imports from the various countries see Appendix C.

Exports.

The principal articles of export are wine, cattle, onions, and fruit (see Annex A).

Wine.

The export of wine to England for 1893, although about the average, was a good deal less than for 1892, which was abnormally high owing to the enormous purchases by the Burnay Syndicate. This year the crop, so far as can be judged as yet, is believed to be good but small, though at present rather later than usual.

Cattle.

The prohibition of the importation into England of cattle is very severely felt, not only in the country, but also by the carrying trade, more especially at present when the general trade is so dull. This was, up to a few years ago, a very lucrative trade, as many as 22,415 head of cattle having been exported in one year, of which 22,393 were sent to England. A Government notification was issued from the Ministry of Public Works, dated May 23, 1894, declaring the whole of Portugal free from foot-and-mouth disease. France, in consequence, cancelled the prohibition of the importation of cattle to that country, and small quantities are now being carried weekly from this port to Havre.

Onions.

Onions are annually exported in large quantities from the northern provinces of Portugal. This country has for many years been famous for her onions, but some years ago, seed having been sent from here to Vallencia in Spain, the climate and soil seemed to suit it admirably, and onions are now exported from there in possibly larger quantities than from here.

Apples.

The apple crop last year was very prolific, but the fruit was attacked by disease, causing the stem to rot close to the fruit which dropped from the trees in large quantities while still unripe.

Year.	Onions.		Apples.	
	Quantity.	Value.	Quantity.	Value.
	Kilos.	Milreis.	Kilos.	Milreis.
1892	13,566,087	206,900	1,913,514	38,300
1893	14,094,569	348,600	2,263,200	45,300

There was a great increase in the exportation of oranges last year. This may be accounted for by the improved price in Great Britain, as they are often left on the trees to rot and drop off unless the price paid makes it worth the trouble of picking.

Year.	Quantity.	Value.
		Milreis.
1892.. .. .	2,992,000	4,500
1893.. .. .	18,000,000	27,000

The other important articles of export are:—

Articles.	1892.		1893.	
	Quantity.	Value.	Quantity.	Value.
	Kilos.	Milreis.	Kilos.	Milreis.
Corks	366 632	149,900	345,966	122,900
Almonds	99,030	32,200	72,205	21,800
Dried vegetables	1,184,902	46,000	1,805,048	72,200

TABLE showing Amount of Bullion Imported from and Exported to Great Britain during the Last 5 Years.

Year.	Amount.	
	Imported.	Exported.
	£	£
1889.. .. .	320,000	..
1890.. .. .	150,000	410,000
1891.. .. .	26,530	1,720,000
1892.. .. .	1,448	562,000
1893.. .. .	4,500	347,000

In the exports is included a small quantity of Portuguese gold. There were also exported in bars during 1891-92:—

Year.						Quantity	Value.
						Kilos.	Milreis.
1891..	..	..	..	..	..	20.5	13,050
1892..	..	..	..	..	..	80.7	50,407
1893..	..	..	..	..	..	..	..

Emigration.

Total number of passengers embarked from Portugal to Brazil during the years 1891-93 were as follows:—

Year.						Number of Passengers.
1891..	..	..	..	..	..	28,534
1892..	..	..	..	..	..	17,759
1893*	..	..	..	..	..	28,109

* The late revolution in Brazil almost entirely stopped, for the time, Portuguese emigration, there being 20,000 passengers during the first 6 months of 1893, as against 8,107 during the second.

The greater portion of the above were emigrants, and of these the majority farm labourers. They come chiefly from the northern provinces of Portugal which are the most thickly populated.

While the cost of living in Portugal has increased considerably, owing to the effects of the financial crisis and from other causes, the rate of wages has not increased to a like proportion, and in fact the demand for artisan labour has decreased, owing to the stoppage of public works, private buildings, and the general financial depression. This, and the other reasons stated in the consular report for 1892, may account for the large emigration which is out of all proportion to the population. Attempts have been made by Government to check this continued stream of emigration (which has in some districts depopulated whole villages, besides draining the country of its best men) by putting difficulties in the way of obtaining passports, but apparently with not much success.

Statistics show, however, that many of those who go to Brazil return to Portugal, and they almost invariably bring back with them some money, the savings from their earnings, the rate of wages in Brazil being considerably higher than in Portugal.

Total number of passengers from Brazil disembarked at Lisbon during 1891-93:—

Year.						Number of Passengers.
1891..	..	..	..	..	..	11,906
1892..	..	..	..	..	..	15,514
1893..	..	..	..	..	..	15,591

Mines and Mining Industry of North Portugal.

There are good lodes of this metal running from north-west to south-east about 8 miles from Oporto; the principal mines are, Montalto, Gondomar, Tapada, Vallongo. These have been worked for some years with more or less success, large dividends have been paid on some of them, but as a rule they have been mis-managed. The antimony is found in the quartz reefs which intersect the silurian schists, and in the same quartz veins gold appears, sometimes in considerable quantities, but whether in paying proportions is still a problem to be solved by mining engineers. Antimony.

During the last 8 or 10 years attention has been attracted to the extraction of gold from the above. Quartz (principally from the antimony mines referred to above) has been sent to Germany, and, I believe, also to England, and the percentage of gold extracted appears to be favourable, but the expense of shipping the quartz for extraction was so great that attention was turned to effecting that process here. Great secrecy has been maintained with regard to the results, therefore no opinion can be formed as to whether the undertakings have been profitable or otherwise. Gold quartz and auriferous iron pyrites.

In Portugal there are three distinct coal deposits. In the north near Oporto the coal is anthracite, of good quality, but often so mixed with shale as to render the working difficult. The principal mines are, St. Pedro da Cora, Passal de Baisco, Covello and Midões, Pejão. The coal extracted from these mines is used in Oporto for cooking ranges and stoves, and the soft coal is made into briquettes (patent fuel) for the same purpose. Coal.

Near Busaco at Santa Catharina there are some coal beds of a semi-bituminous coal, but these mines are not now being worked.

The principal mines are Braçal and Coimbra, working; and Gondarem, not working. Silver lead and lead.

A small amount is extracted and shipped abroad from a mine near Anadia. Manganese.

This metal is found distributed generally all over Northern Portugal in larger or smaller degrees. The only large deposit is at Moncorvo about 80 miles up the river Douro. This iron is magnetic and the supply is very large, but the distance from a seaport renders it valueless, until a railway or other means of communication enables it to be shipped at a small expense. Iron.

A small amount of gold washing is done, but only in summer, and by loafers.

Slate and Marble Quarries.

There are several very good slate and marble quarries in Northern Portugal. The latter, although the marble is of very fine quality, either from bad management or some other cause do not seem to be worked with success. Slate, however, is worked in some districts most successfully. One quarry, near Vallongo, belonging to an English Company, exports slabs, beds for billiard

(1832)

B

tables, and slates for roofing, both to England and Brazil. One slab 17 feet long, from this quarry, was exhibited at the Adelaide Exhibition.

Public Works.

These have everywhere been completely stopped, owing to want of funds. The consequence is that large buildings, originally intended for hospitals or public offices, are left half built and fast becoming ruins, while roads, on which large sums of money have been spent (among others a new road called the "Circumvallation Road," of which great things are expected in the future, and of which an account was given in the Consular report for 1892), are, for the same reason, left in a half-finished state, all, or nearly all, work on them being suspended.

The roads around Oporto, which were at one time, I believe, kept in excellent repair, are now becoming almost impassable for vehicular traffic, except for the bullock cart, the principal cause of all the evil.

Shipping and Navigation.

Appendixes
D and E.

The total number of ships of all nations which crossed the bar in 1893 was more than in 1892, but less than in 1891, and the total number which entered the harbour of Leixões in 1893 was slightly less than in 1892. This last may, to a certain extent, be accounted for by the emigration to Brazil having entirely ceased during the revolution; ships to embark emigrants, in consequence, stopped calling.

The largest ship which entered Leixões Harbour last year was the British steamship "Orellana," of 3,095 tons register, 401 feet long, and 25 feet draught of water. During the year 13,558 passengers, chiefly emigrants to Brazil, embarked, and 229 disembarked at this harbour.

Ship canal.

A proposal is just now before the Government for connecting the harbour of Leixões with the Douro by means of a ship canal, 5 kiloms. long, 25 metres wide, and 24 feet deep, with a lock at each entrance; this would allow ships drawing 22 feet to enter the river at all states of the tide, and there is sufficient water in the Douro for ships of that draft. This proposal also embraces making the river navigable, by means of steam towage, as far up as Moncorvo, where there are large iron deposits. The Government have gone so far as to appoint a committee of three persons to examine into the question, and report as to the best means of carrying out the proposal.

Chicago Exhibition.

It having been considered advisable, as a means of making the Portuguese wines better known in the United States, to which at

present a comparatively small amount is exported, to send samples to the Chicago Exhibition of the various qualities grown in this country; the Commercial Association here, in conjunction with several wine shippers and growers, took the matter in hand, with the satisfactory result that the Portuguese wines have obtained the most honourable classifications and the highest awards.

Except to one firm, which makes a soap in a very colourable Soap. imitation of a well-known English brand (and possibly also to the makers of the quite common soaps), this is not at present a lucrative trade, on account of too great competition and the large duties that have lately been put on the raw materials.

General Observations.

The northern provinces of Portugal, more especially the Minho and Douro districts, are in many parts very beautiful, and would well repay a visit were it not that difficulties of every sort meet the stranger from the moment of his setting foot on Portuguese soil, till, and up to, his leaving it. His baggage is ruthlessly overhauled, not only on the frontier but on every possible occasion, and he is fortunate if he himself escapes a similar ordeal. The lower grade officials, such as the custom-house boatmen and searchers, the railway stationmasters, the soldiers connected with the octroi duties, "et hoc genus omne," having been shoved into their places, utterly regardless of their fitness for the posts, through the political influence of some patron, in no way help to make matters run more smoothly. The trains are few and slow; the roads, in some parts of the country, almost impassable; and the accommodation, away from the principal towns, squalid to a degree. In fact, nothing is done to attract, everything to deter, the traveller.

The following extracts, which I have translated from the annual report of the Commercial Association, show the feelings the Portuguese themselves entertain about present conditions of trade and the difficulties from which it suffers:—

"Luckily the past year has found the conditions of commercial life no harder, thanks to the premium on gold and the rate of exchange not having altered for the worse. However, commerce has had to suffer much from the threats of increased taxation; from the exaggerated customs tariffs; from the permanent state of uncertainty in which trade is placed; from the grave want of commercial treaties, the negotiations for which are carried on with incredible delay; and, lastly, from the numerous acts and measures on the part of the public administration, which, far from advisedly promoting the expansion of our mercantile relations, appears purposely to place all kinds of difficulties, restraints, and restrictions on its sphere of action. The want of the renewal of the commercial treaties has been the cause of other nations who compete with us stepping in before us, and obtaining better conditions and

international treatment than we who follow shall be able to obtain. Italy and Spain, for example, have taken the lead, and made treaties of commerce, or have at least regulated their commercial relations, with France, with Germany, and with other countries, deriving therefrom advantages which result in injury to us. Our export trade in cork, almonds, preserved goods, salt, &c., will be seriously prejudiced by the delays which have occurred in the making of the treaties. The raising of the alcoholic scale which undoubtedly threatens us on the part of those countries where we have the best markets for our wines, if we do not hurry to conclude the mercantile treaties, will result in a mortal blow to the export of our most valuable article, which in itself alone embraces the best part of the total value of our exports."

Again, speaking of this most important—in fact, the only important—export (wine):—

"The public administration and the customs try, by all manner of indirect means, to hinder this branch of commerce, levying heavy import taxes on all the auxiliary objects required in the wine trade, on bottles, casks and staves, capsules, labels, &c., besides the duty on the export of the wine itself. This would certainly not be done in any other country which had a clear comprehension of its own interests. Another indispensable element on which the customs make pitiless war is the import, into Portugal, of spirit and brandy, the price of which, burdened by the import duty, has risen to proportions completely prohibitive."

Two facts might here be mentioned, though utterly unconnected with each other, and arising from no fault of her own, which are at this moment weighing heavily on Portugal, causing, together, an annual loss to the country of about 10,000,000*l.*; but which, the first by degrees, as the devastated part of the country becomes replanted, and the second at any moment, as the result of a more settled state of matters in Brazil, will, it is to be hoped, eventually right themselves. They are, the annual loss to Portugal from the devastation caused by the phylloxera, which is estimated at about 2,000,000*l.*, and the decreased annual expenditure of the many Brazilian families (or rather Portuguese, who, having made their money in Brazil, have returned to this country), on account of the bad state of exchange with Brazil. It has been computed that there are about 40,000 families who have reduced their annual expenditure by, on an average, about 200*l.* This comes to the large amount of 8,000,000*l.* Unfortunately, the evil does not end here, as many of these families, living in constant hope of an improvement in Brazil, have arranged with their tradesmen to be supplied on credit till this hoped-for day arrives. This having, however, been now so long delayed, these tradesmen are themselves getting into difficulties, and thus increasing the general depression in trade throughout the country.

I would recommend anyone desirous of making himself better acquainted with the internal affairs of this country to read a small pamphlet recently published by the now defunct Commercial

Association of Lisbon, in which nearly all matters connected with the interior economy of this country are dealt with. Among others, an interesting comparison is made between the army of Portugal and those of other second-class Powers, in which it appears that the Portuguese army, consisting of some 18,000 men and over 60 generals, costs annually 5,123,656 milreis, or say, in round numbers, 1,136,000*l.*, as against, for instance, that of Switzerland, consisting of 488,990 men, at a cost of 6,000,000 milreis, or, roughly, 1,300,000*l.*

CAMINHA.

Mr. Bury Harrison, the Acting British Vice-Consul at Caminha, writing on the trade and commerce of that district, says:—"The Portuguese have a very strong prejudice in favour of all English goods, more especially calicoes and prints, and I have always felt convinced, if a good English house or two sent over a traveller who could speak the language and who knew his business, a very good, indeed large, trade could, in spite of duties, be done in this and surrounding towns. All the shopkeepers are extremely honest in so far as paying for what they purchase, and there is actually no risk of bad debts, a very great consideration in trading in a foreign country. No end of things would sell besides those I have mentioned. French and German houses can, and do, sell a large quantity of goods with the same duties, and why cannot the English do the same? The very first thing English merchants should look to is to have travellers who quite understand the languages of the countries they are to be sent to."

Appendix A.—TABLE showing Quantities of the Wine Exported from Oporto during the Years 1892-93.

Country.	Unfortified (Communs).			Fortified (Licorosos).		
	Quantity.		Value.	Quantity.		Value.
	1892.	1893.		1892.	1893.	
Germany ..	..	..	..	..	..	..
Austria ..	..	..	..	..	..	..
Belgium ..	..	..	..	..	..	..
France ..	..	..	..	..	..	..
Spain ..	..	..	..	..	..	..
Italy ..	..	..	..	..	..	..
Portugal ..	..	..	..	..	..	..
United States ..	..	..	..	..	..	..
Other Countries ..	..	..	..	..	..	..
Total ..	1892.	1893.	Value.	1892.	1893.	Value.
Germany ..	48,055	57,432	..	..	..	..
Austria ..	..	..	5,150	..	..	..
Belgium ..	..	..	..	..	..	..
France ..	11,738	5,450	1,343	..	..	..
Spain ..	..	..	..	..	..	..
Italy ..	..	..	..	..	..	..
Portugal ..	24,106,256	23,425,016	2,559,880	3,996,521	4,696,062	1,409,685
United States ..	..	..	..	28,791	22,199	5,048
Other Countries ..	..	..	..	..	..	..
Total ..	63,122	37,2	56	1,015,519	933,234	205,671
Belgium ..	11,225	6,089	916	318,657	296,720	63,465
United States ..	353,562	41,432	2,929	334,381	424,517	75,641
France ..	..	..	..	..	..	..
Germany ..	..	..	..	..	..	..
Italy ..	..	..	..	..	..	..
Spain ..	..	..	..	..	..	..
Portugal ..	..	..	..	..	..	..
United States ..	..	..	..	..	..	..
Other Countries ..	..	..	..	..	..	..
Total ..	1,976	1,907	260	320,448	491,494	67,627
Belgium ..	..	..	..	..	..	..
United States ..	..	..	..	..	..	..
France ..	..	..	..	..	..	..
Germany ..	..	..	..	..	..	..
Italy ..	..	..	..	..	..	..
Spain ..	..	..	..	..	..	..
Portugal ..	..	..	..	..	..	..
United States ..	..	..	..	..	..	..
Other Countries ..	..	..	..	..	..	..
Total ..	91,837	114,504	17,020	26,146,999	15,210,251	5,002,942
Belgium ..	..	..	..	..	..	..
United States ..	..	..	..	..	..	..
France ..	..	..	..	..	..	..
Germany ..	..	..	..	..	..	..
Italy ..	..	..	..	..	..	..
Spain ..	..	..	..	..	..	..
Portugal ..	..	..	..	..	..	..
United States ..	..	..	..	..	..	..
Other Countries ..	..	..	..	..	..	..
Total ..	320	320	20	476	1,128	283

PORTUGAL.

TABLE showing Qualities of the Wine Exported from Oporto during the Years 1892-93—continued.

Country.	Unfortified (Communs).				Fortified (Licorosos).			
	Quantity.		Value.		Quantity.		Value.	
	1892.	1893.	1892.	1893.	1892.	1893.	1892.	1893.
	Litres.	Litres.	Milreis.	Milreis.	Litres.	Litres.	Milreis.	Milreis.
Japan	..	..	..	..	850	..	..	..
Mexico	..	..	..	..	..	..	..	..
Paraguay	4,500	..	..	..	..	..	..	..
Peru	..	..	..	..	..	..	..	..
Portuguese provinces in Africa	264,813	216,506	30,582	25,598	2,829	1,554	600	500
Portuguese provinces in Asia	450	..	60	..	54,585	32,320	22,018	13,643
Argentine Republic	26,529	92,845	3,138	9,570	190	51	120	35
Hawaiian Republic	..	..	..	..	30,380	107,596	11,061	31,384
Uruguay	44,457	20,586	4,720	2,520	..	212	..	45
Russia	133	899	13	301	54,836	64,345	16,751	17,800
Sweden and Norway	1,067	1,402	115	138	616,581	814,091	122,823	157,328
Venezuela..	..	..	..	..	74,432	178,924	14,231	36,912
Zanzibar	86	..	98	..	943	..	200	..
Ship provisions	1,866	7,022	164	649	510	..	300	..
	..	..	..	..	91	221	48	76
Total	25,030,057	23,992,982	2,641,953	2,673,602	36,325,706	25,868,109	7,678,370	5,930,839

Oporto.

Appendix B.—Quantities and Values of Cereals Imported into Oporto during the Years 1881-93.

Year.	Wheat.		Maize.		Rye.		Barley.		Oats.		Flour.	
	Quantity.	Value.	Quantity.	Value.	Quantity.	Value.	Quantity.	Value.	Quantity.	Value.	Quantity.	Value.
1881	Kilos. 12,599,824	Mirreals. 552,276	Kilos. 5,005,248	Mirreals. 157,884	Kilos. 427,046	Mirreals. 13,958	Kilos. 186	Mirreals. 15	Kilos. 298,443	Mirreals. 17,984	Kilos. 298,443	Mirreals. 17,984
1882	14,493,409	643,123	5,324,094	143,876	533,167	29,125	124,762	3,716	122,655	8,884	122,655	8,884
1883	13,041,488	664,921	9,298,662	233,171	671,008	14,898	713,457	18,670	48,591	1,685	249,333	17,657
1884	14,984,127	618,929	1,067,649	462,166	86,286	2,046	...	...	...	...	183,728	10,766
1885	16,465,098	606,669	2,764,127	66,339	43,813	966	684,039	15,874	...	...	341,806	28,814
1886	17,946,085	646,829	211,628	5,662	...	...	616,628	14,191	...	...	971,896	47,867
1887	25,547,520	900,279	745,718	12,493	296,238	5,330	391,366	9,264	8,166	126	860,487	38,843
1888	33,884,287	793,931	1,613,119	17,369	...	...	...	...	...	...	478,216	13,091
1889	14,267,663	461,803	...	...	...	...	...	...	...	...	706,910	43,553
1890	17,296,091	625,927	1,967,019	39,672	...	...	...	...	...	...	...	...
1891	29,896,162	969,616	9,176,923	292,039	...	...	194,100	2,506	...	...	...	...
1892	27,298,941	1,092,262	28,365	3,660	...	...	5,141	366	...	...	...	...
1893	46,361,671	1,866,903	...	...	279	10	23,098	720	911	76	1,263,742	89,108

Appendix C.—TABLE showing Values of Imports into Oporto from all Countries during the Years 1893-92.

Country.	Value.	
	1893.	1892.
	Milreis.	Milreis.
Great Britain	3,940,600	3,247,800
United States	2,203,700	1,718,200
Germany	2,159,100	1,338,000
Brazil	1,582,000	1,176,400
France	1,257,300	917,200
Sweden and Norway	689,100	387,900
Belgium	504,300	391,700
Russia	388,700	182,900
Austria	175,200	140,900
Italy	163,300	210,100
China	155,600	99,400
Holland	130,700	69,000
Spain	61,900	55,400
Switzerland	54,900	33,700
Denmark	17,300	9,100
Not mentioned	68,200	90,500
Total	13,501,900	10,068,200

Appendix D.—RETURN of all Shipping at the Port of Oporto during the Year 1893.

ENTERED.

Nationality.	Sailing.		Steam.		Total.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.
British	48	6,904	259	145,379	307	152,283
Portuguese	56	23,372	32	32,281	88	65,653
" coasting	206	17,595	33	11,125	239	28,720
German	3	2,139	134	72,715	137	74,854
American	4	2,472	...	...	4	2,472
Austrian	2	938	2	2,029	4	2,967
Belgian	...	...	...	...	...	...
Brazilian	4	1,196	...	...	4	1,196
Danish	2	380	12	6,345	14	6,725
French	14	1,678	11	4,770	25	6,448
Greek	...	...	...	...	...	...
Spanish	4	717	3	1,619	7	2,336
Dutch	...	...	3	1,562	3	1,562
Italian	8	4,489	1	1,293	9	5,782
Russian	3	769	5	3,268	8	4,037
Swedish and Norwegian	12	3,54	59	21,798	71	25,344
Other countries	...	...	...	...	...	...
Total	366	66,195	554	304,184	920	370,379
" 1892	342	62,593	539	290,189	881	352,782
" 1891	378	66,963	560	292,720	938	359,683

CLEARED.

Nationality.	Sailing.		Steam.		Total.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.
British	46	6,668	290	146,324	336	152,992
Portuguese	61	29,008	32	30,081	93	59,089
" coasting	195	16,244	34	11,681	229	27,925
German	3	2,783	134	72,965	137	75,748
American	4	2,472	...	...	4	2,472
Austrian	1	651	2	2,029	3	2,680
Belgian	...	...	...	...	...	...
Irish	3	865	...	...	3	865
Danish	2	480	12	6,345	14	6,825
French	14	1,705	11	4,770	25	6,475
Greek	...	...	...	...	...	...
Spanish	4	717	3	1,619	7	2,336
Dutch	...	...	3	1,562	3	1,562
Italian	7	4,230	1	1,233	8	5,463
Russian	3	769	6	3,268	9	4,037
Swedish and Nor-	...	...	...	...	...	...
wegian	12	3,063	60	22,453	72	25,516
Other countries ...	...	...	...	...	...	...
Total	365	67,805	557	269,136	922	336,941
" 1892	342	66,400	560	288,136	902	354,536
" 1891	385	69,382	576	301,908	960	371,290

Appendix E.—RETURN of Shipping for the Port of Leixões (Oporto) during the Year 1893.

ENTERED.

Cause of Entrance	Steam.		Sailing.		Total.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.
Awaiting opportunity to enter the bar ...	74	49,918	69	13,257	143	63,175
To receive cargo and passengers	98	138,971	8	5,804	106	144,775
To receive passengers	29	40,557	...	...	29	40,557
To receive orders	9	6,008	14	883	23	7,251
To discharge cargo	6	5,814	15	1,399	19	7,213
To discharge and load cargo	1	1,646	...	...	1	1,646
To perform quarantine	23	16,659	4	904	27	17,563
To lighten and enter the port	13	18,440	5	2,466	18	20,906
Put in waiting distress of weather	2	540	34	2,542	36	3,082
Put in waiting to discharge	2	1,101	...	...	2	1,101
Yachts	2	302	...	...	2	302
Lying off the Harbour on December 31, 1892	...	...	5	1,008	5	1,008
Total	360	285,436	180	28,993	540	314,429

CLEARED.

	Steam.		Sailing.		Total.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.
Clearances	258	382,032	100	28,209	408	410,241
Lying in the Harbour on December 31, 1893	1	1,104	...	...	1	1,104
Total	259	383,136	100	28,209	409	414,345

FOREIGN OFFICE.
1894.
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PORTUGAL.

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ON THE
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REFERENCE TO PREVIOUS REPORT, Annual Series No. 1280.

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1369. Antwerp	2d.	1429. Meshed	1d.
1370. Genoa	3½d.	1430. Copenhagen	½d.
1371. Batoum	2d.	1431. Galveston	2½d.
1372. Rouen	2½d.	1432. Hamburg	2½d.
1373. Santo Domingo	½d.	1433. Brindisi	2½d.
1374. Nantes	1½d.	1434. Gothenburg	2d.
1375. Taganrog	2½d.	1435. Kiungchow	1d.
1376. Isphahan	4½d.	1436. St. Petersburg	½d.
1377. Leghorn	2d.	1437. Malaga	1d.
1378. Cagliari	1d.	1438. Chicago	2½d.
1379. Boston	1d.	1439. Odessa	2d.
1380. Palermo	3d.	1440. Tabreez	½d.
1381. New York	2d.	1441. Tahiti	½d.
1382. Zanzibar	2d.	1442. Shanghai	2d.
1383. Naples	1½d.	1443. Nagasaki	1d.
1384. Constantinople	2d.	1444. Madrid	2½d.
1385. Buenos Ayres	5½d.	1445. Malaga	2½d.
1386. Caracas	1½d.	1446. Rotterdam	1d.
1387. Vienna	1½d.	1447. Port Said	1½d.
1388. Madeira	½d.	1448. Sofia	2½d.
1389. Panama	1½d.	1449. Warsaw	1½d.
1390. New Orleans	2½d.	1450. Africa (Congo)	2d.
1391. Manila	2d.	1451. Jeddah	1½d.
1392. Foochow	1d.	1452. San Francisco	5½d.
1393. Ningpo	1d.	1453. Oporto	2d.
1394. Chinkiang	1d.	1454. Barcelona	2d.
1395. Tamsui	1d.	1455. New Caledonia	½d.
1396. Chungking	1½d.	1456. Smyrna	1d.

No. 1457.

Reference to previous Report, Annual Series No. 1280.

PORTUGAL.

MACAO.

Consul Brenan to the Earl of Kimberley.

My Lord,

Canton, June 20, 1894.

I HAVE the honour to forward herewith a Report on the Trade and Commerce of Macao and Timor by Mr. H. B. Joly, Her Majesty's Acting Vice-Consul in Macao.

I have, &c.

(Signed) BYRON BRENNAN.

Report on the Trade and Commerce of Macao and Timor for the Year 1893.

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MACAO.

General Summary.

In drawing up my report for 1893 I feel compelled to confine myself, as far as statistics go, to the first half of the year, as only those for that period have as yet appeared in the “Boletim Official.” To wait until the publication of those of the other half will entail considerable delay, as in many cases they only appear some time in June or July. The figures I have in hand have, however, been sufficient, with the information I have derived from various sources, to enable me to arrive at more or less correct conclusions on the subject of the trade and commerce of this colony during 1893.

Imports and Exports.

It is indeed satisfactory to note an increase in both imports and exports, by junks as well as by steamers.

Reasons of
increase.

Foreign trade.

This increase, especially accentuated in the case of imports, must, in imports, be attributable to the exhaustion of local stocks, and the renewal of larger supplies as a provision against an unfavourable exchange; and in exports to the operation of the depreciation of silver. For as Macao is a feeder only for such inland and coast markets as are dependent upon it, and a port of export for such goods as still find their way here on account of the comparative cheapness of storage, packing, &c., no great and lasting revival can occur in imports until it becomes an emporium for new markets and local consumption increases, and in exports until local industries and other native imports swell to such a number as to add an impetus to the trade to foreign countries.

What, however, might with fostering care be made a greater and greater source of profit to this colony is the coast trade in native products. The trade in foreign goods has, since Hong-Kong deprived Macao of its status, settled into a groove, and its extent has ever continued commensurate with the existing demand. But the coast trade in native goods is the trade which it is imperative to look to, as the more it expands the more will it materially assist the prosperity of Macao. There are, of course, certain articles which the Chinese still prefer to prepare here before shipment to foreign countries via Hong-Kong, but so soon as expenses increase and rents rise a change will come over the present system of operations. That this decrease is becoming an accomplished fact is proved by the statistics of the Lappa customs; but the very same returns establish the gratifying result that a very considerable increase has yearly become apparent in the coast trade in Chinese produce. In fact, Macao is specially adapted for this trade. Its situation at the mouth of the West River makes it a mart for the produce of the west coast of Kuangtung and the prefectures of Kuangchow and Kimling. This native trade has so far added much to the life of the numerous Chinese hongts established here, and it will still increase the prosperity of Macao more and more if proper attention is given to prevent its diversion.

Coast trade.

Opium is, as hitherto, the most valuable article of import and export. It is imported crude, and exported mostly prepared. The opium farmer, however, is the sole person who enjoys the monopoly of boiling down the drug; but other parties have the privilege of importing and exporting it in a raw condition. During last year no agreement was again concluded with the opium farmer in Hong-Kong, so that the San Francisco and Australian steamers have had to call at Macao to ship their valuable cargoes.

Opium.

This new order of things is far more economical than the former régime, when the opium farmer had to be paid a heavy sum for the permission of passing the prepared opium through his preserves in Hong-Kong. The statistics before me for the first half of 1893 show a decrease both in the import and export of opium. Nor can the second half of the year have been more satisfactory, as even assuming that heavy stocks had to be worked off, the general opinion is that a reaction would have taken place before long had not the falling exchange completely paralysed this trade. For the present, however, native opium has not received any impetus nor come into favour. In fact, little, if any, finds its way as yet so far south. Neither could smuggling be held responsible for the decrease, for though smuggling still continues, especially in the case of junks from Singapore, as they bring back opium in lieu of remittances, now that the rate of exchange is so uncertain and low, it cannot have assumed such vast proportions as to have diverted any so very considerable quantity of opium from the legitimate channel of importation.

Native opium.

The rest of the imports continue to be kerosene, matches, Other
(1840) A 3 imports.

sugar, cotton and woollen goods, wines, &c. The only articles, however, that come out from Portugal are wines and some kinds of stores.

Tea. The same doleful tale is heard on all sides. The business done during 1893 has been again unremunerative and restricted. In fact, how can profits be realised when tea is bought at 9*d.* or 10*d.* per lb. and sold in London at 4*d.* and 5*d.* per lb.? The competition from India and Ceylon is no doubt responsible for a good deal of the shrinkage which steadily goes on in the trade, but other causes have during the year operated to check the sale of Macao teas. These teas are, of course, getting into disfavour; but the coal strike has exercised a baneful influence upon sales at home, as the cheap and low grades of tea imported for the mining classes remained without demand, the low state of the purses of the miners precluding them from indulging as freely, if at all, in tea drinking. As no reduction of internal imposts has besides been attempted by the Chinese Government, and no improvements have been adopted by the native growers, the export has seen no change for the better, and seems, what is more, doomed to extinction.

Number of chests. The number of chests exported was 195,027 against 147,000 in 1892, but of these only 110,000 or so went to the London market, the rest having been sent to Hamburg. This result makes my remarks appear at first sight paradoxical; but this increase was made up not by what has so far been known as tea, but by a composition which has within the last 2 or 3 years come into high fashion.

"Lie" tea. Indeed, the only kind of tea which has brought in any returns, is this new blend, which goes under the designation of "lie" tea. This term sufficiently explains its quality, for there is no doubt that the mixture could only be called tea in its correct acceptance through a considerable sacrifice of truth. These teas are manufactured from exhausted tea leaves, which are dried, re-fired and mixed with a certain proportion of genuine tea and of seeds and dust. Most of this preparation proceeds to Hamburg, where no "Adulteration Act" is in force; but a good deal of mystery enshrouds its ultimate fate, for there are various versions as to its disposal, some parties averring that it is consumed by the lower classes, others that it is sold to ships, and others that a quantity of it probably leaks into England as well. From what I can gather, some of this "lie" tea is often packed in chests labelled "best congou," and shipped to India for the lower classes. But tastes differ, just as the tea sent to France and the Continent generally is a mere conglomeration of stalks and twigs, and to all appearances, no tea at all. But genuine tea does not seem to be in high request, and the growing demand has naturally to be satisfied by a special preparation.

Tea to Australia. In Australia, where some tea used to go, the shipments of Indian and Ceylon teas are again ousting the teas of this district. This continuous falling-off in supplies proves forcibly the unpopularity of Macao teas, but a better and cleaner tea naturally

soon comes into favour, so that this shrinkage is not to be wondered at. Nor does the low exchange appear to give an impetus to the export or add a cent to the profits, if any.

Silk was made in three sizes during the year, that is, of Silk. 9/11 deniers, 10/12 deniers, and 11/13 deniers. The total business done amounts to 425 bales of $106\frac{2}{3}$ lbs. each. This shows a slight falling-off from 1892, when 437 bales were exported. This difference might be due to financial difficulties abroad or fluctuations in the exchange. Prices varied from 65*l.* 5*s.* (580 dol.) to 84*l.* 18*s.* 9*d.* (755 dol.). This is practically an increase, as the lowest price paid in 1892 was 505 dol. and the highest 680 dol. In order to avoid misconception and to facilitate comparison, I may mention that the figures 69*l.* 8*s.* 9*d.* for the lowest, and 93*l.* 10*s.* for the highest given in my report for 1892 were derived by conversion of the currency into sterling at 2*s.* 9*d.*, the rate then prevailing. The rate of 2*s.* 3*d.* is the one I have taken for this year, as that was the exchange for December.

The export of waste silk consisted of 220 bales against 182 Waste silk. bales in 1892. Each bale weighed $133\frac{1}{3}$ lbs. and fetched from 72 dol. (8*l.* 2*s.*) to 85 dol. (9*l.* 11*s.* 3*d.*) for quality No. 1; and from 45 dol. (5*l.* 1*s.* 3*d.*) to 55 dol. (6*l.* 3*s.* 9*d.*) for quality No. 2. As far as prices go, these figures are in sterling below, but in currency above those of 1892. It is evident, therefore, that there is an upward tendency caused presumably by the exchange. Indeed, there is not the least doubt that a Chinaman takes exchange into consideration in his various transactions with foreigners, though the rate whether high or low has practically nothing to do with him.

Work has been sustained at the cement works on Green Cement. Island well nigh throughout the whole year. An impetus was, in fact, given to the operations of the company when the exchange began to drop by leaps and bounds. The low exchange is of course in favour of local output, for the Green Island cement, can under such conditions alone oust its rivals and hold its own with the cement imported from home. Not because it is inferior in point of quality, but because of drawbacks against which it has to labour. With cheap labour and cheap material, not to speak of comparatively low freights, &c., there is no reason why the company should not have effected fair returns, but anomalous though it may at first sight appear, the balance is on the wrong side of their accounts, mainly because the concern was started with too high a capital to enable the directors to pay any return. Nor can much of the money subscribed be returned to the shareholders, as large sums had to be sunk in the works to remedy the mistakes made by the Chinese promoters. New machinery, new kilns, and additions to the buildings absorbed a considerable amount of capital. But some time ago an attempt was made to reduce the capital, and put the company on a new and firmer basis, but the fees leviable by the Portuguese Treasury were so heavy a drain that the scheme of reconstruction had to be abandoned. The raw materials for cement are limestone and clay, of which

enormous quantities are within easy reach. The first is procurable in the provinces of Kuangtung and Kuanghsi; and the latter in the inner harbour itself, just in front of the very works. The coal used is Japanese anthracite as well as briquettes of coal dust imported from Hongay in Tonking. Both of these can be conveniently purchased at comparatively low rates. Most of the output goes to Manila, various ports of China, Hong-Kong, Japan, and other more distant points. The quality is pronounced good so that it should be able to command certain markets.

Other exports. The remaining exports consist of various oils, such as cassia oil and aniseed oil, feathers, soy, rice, &c. The export of essential oils has, however, been to a degree diverted by the French in Tonking.

Shipping.

The vessels of the Hong-Kong, Canton, and Macao Steamboat Company, which continued their voyages, the "Heung Shan" daily to Hong-Kong, and the "White Cloud" every alternate day to Canton, formed with the steam launches "Perseverance," "Wing Yuen," "An-po," and "Wing-wa" plying every day between Hong-Kong and Macao, and the small steamer "Chin Shan" and the launch "Sun-chow" every other day between Canton and Macao, the bulk of shipping which frequented this port. As regards nationality, the British flag preponderated, for all the vessels mentioned above fly, with the exception of the "Sun-chow," the Union Jack. The "An-po" and "Wing-wa" came on the line towards the close of the year. In the way of outside steamers, 17, and 1 sailing vessel visited Macao, of which 14 were British. Most, if not all of these, came here under agreement with the opium farmer to take prepared opium to California or Australia, or under contract with the Macao authorities to carry stores, &c., to Timor on their way south. These steamers, of which 9 were for Australia and 5 for California, called here for opium. The Macao farmer finds to his advantage, as I said above, to ship his opium from here, as he had to pay 90,000 dol. (about 10,000*l.*) per year for the privilege alone of taking opium via Hong-Kong, and to bear a freight of 75 c. per box of 500 taels for carriage from Macao to Hong-Kong.

Besides the British vessels enumerated, four others visited this colony, bringing excursionists on some great saint's day to be present at special religious services and processions.

Added to these, the steamers of the Eastern Extension Telegraph Company came to Macao to repair the cable between this colony and Hong-Kong. Nor must I omit to notice a small vessel of 77 tons, called the "Taiping," which tried to take her place on the line between Hong-Kong and Macao. After several trips she, however, had to abandon the attempt, as she was too slow, and required 6 hours to perform a run of 40½ miles. This run is ordinarily made by the regular boats in a little over 3 hours, so that she stood little chance of coming into favour.

There is, however, one point worthy of note about her and the "Chin Shan," and that is that they were entirely built and engined by the Chinese. Neither of these boats are of elegant build, but they go far to show the enterprise and ingenuity of the Chinese at Hong-Kong.

The number of German steamers fell from 12 to 2. The one of these brought salt and left in ballast; the other, the "Tetartos," came under charter to ship coolies for Brazil. The remaining two outside vessels flew the American flag. The first was a boat of the American line, and came to take opium for San Francisco. The other was a barque, called the "Serrano." She had, in consequence of the outbreak of cholera in Timor, to be chartered to convey stores and to take the place of the "Airlie," which was to have called at Dili on her way to Australia, but which had to be withdrawn so as to avoid quarantine and delay. Nor must I close my remarks on shipping without adding that there is as yet no direct line to Portugal, much though the scheme was talked of at one time. But the trade between this colony and the mother country is so small that no line will ever pay. The Spanish mail, whose terminus is at Manila, enjoys still the privilege of carrying Government employes and troops from Lisbon to the Far East.

As regards native shipping there is not much that I can add to what I said in my reports of former years. They continue, in spite of steam competition, to hold their own and to carry their fair quota of passengers and cargo on their voyages not only to Hong-Kong and Canton and the inner waters, but to more distant parts, such as Annam, Hainan, Formosa, and Singapore.

A branch of the National Bank of China was opened during the year; but it transacts but little business, as the mercantile body do their financing in Hong-Kong. Nor do the natives make much use, if any, of the bank. But the operations of this establishment could well be expanded if any facilities existed for advances to natives on their cargoes. But as foreign banks would require a certain security before making any advances on uncertain quantities, the bonded warehouse system, under some customs supervision or Government control, would seem to be the chief desideratum. These warehouses were at one time talked about, but no steps have ever been taken for their introduction.

Owing to the fall of the price of silver the home Government was induced to reduce the exchange from 850 reis a dollar to 640 reis. The officials here had strongly petitioned the Government to consider their claims, and by this reduction they practically obtained, as far as local demands go, 25 per cent. increase of salary. This increase is, however, counterbalanced by the sudden rise of living which recently took place in this colony, not only in luxuries, but in the ordinary necessities of life, and by the higher prices charged by the Chinese for everything. These born traders soon got wind of the change, and, when twitted with inconsistency, reply: "You get more money, so you can pay more."

This reduction in the exchange affects trade in so far that

all tonnage and port dues, and taxes and licences are payable at the new rate. The result is, that in the absence ofreis more dollars and cents have to be given to make up the difference.

Emigration

No further attempt has been made to send another consignment of coolies to the Congo State. The agents of the Companhia Brasileira opened, however, an office here, and made arrangements to ship coolies to Rio de Janeiro. Consequent upon the reduction in the influx of immigrants from Europe to Brazil, the attention of the Government was turned to China, and the company took upon themselves to supply the large number of emigrants required, estimated by some at over 1,000,000 coolies, from the teeming population of the Celestial Empire. For this purpose the agents endeavoured to carry on their operations from Hong-Kong, but, failing in their efforts to enlist the support of the authorities, they established themselves in this colony. After many difficulties in finding a vessel of large tonnage, for they could not get any of the British steamers, they at length chartered the German steamer "Tetartos," a vessel of 1,578 tons, which cleared on October 15 with 478 coolies on board for Rio de Janeiro direct. Rumours have during the year been also afloat that emigration to Peru and Chile and Mexico would be started, but no steps have been taken to give effect to any of these schemes.

Harbour.

No works have as yet been taken in hand to improve the condition of the harbour, and, what is more, no measures seem likely to be adopted for the present to cope against the accumulation of mud and sand washed down by the neighbouring rivers. In fact the silting is proceeding at such a pace that even the native shipping will shortly find the approaches to Macao, and the entrance into the harbour difficult. This rapid silting tends, more than anything else, to affect the importance of Macao and to hasten its decadence.

The Macao treasury has great resources in reserve for the works, and could bear the expense without a loan, but the home Government appears loth to realise the true dangers ahead and to see that the improvements of the harbour and the outlay for a safe and good anchorage would materially augment maritime trade and usher in an era of comparative prosperity.

Meanwhile, even in Macao there are those who view the inroads of mud and sand with indifference; for, they say, in other more important ports than Macao, such as Shanghai, Tientsin, &c., vessels have to wait for the tide, and they can do the same on arrival at this colony, forgetting that the entrance into the harbour is during the highest tide even difficult, if not impossible to many vessels. This unsatisfactory state has, together with the lack of freight and the heavy tonnage dues of 6 c., driven shipping to Hong-Kong. More than that, it will entail further losses for this colony, as it will certainly forfeit the benefits which it might otherwise have enjoyed as a port of call for vessels plying between Hong-Kong and Wuchow.

Post office.

An innovation was carried out during the course of the year,

which I think it expedient to mention, as it not only bears upon private individuals, but upon tradespeople and business people in general. This innovation consists in the practical increase of post office rates; for whereas under the former exchange of 850 reis per dol. the postage for Hong-Kong was 2 c., it is now $3\frac{1}{2}$ c.; and whereas a letter could be sent to any part of Europe for $9\frac{1}{2}$ c. at first, and then for about $11\frac{1}{2}$ c., an excess of about $6\frac{1}{2}$ c. has now to be made up. Of course the Government says a reis is always a reis, but this argument does not hold good locally, as the residents and natives here have to pay a difference, which, with their incomes fixed as a rule at so many dollars and cents, amounts to a substantial increase. Added to this, what causes some soreness is that whereas letters could hitherto be sent free to Hong-Kong and Canton, where they were distributed by the courtesy of the owners and agents of the steamboat company, they have now to be sent through the post office. The authorities are no doubt within their rights, the more so as the object of the new rule is to add to the income, but those whose pockets are affected feel sorely dissatisfied. There is, however, some little inconsistency in the enforcement of this new rule, for while foreigners have to send their letters by the official post office on payment of a high rate of postage, Chinese are indiscriminately allowed to run their own offices and put their own bags on board. Naturally the customers of these local posts have to pay some charge for the carriage of their correspondence, but this charge is comparatively light and insignificant. Indeed, it is quite a sight, on the arrival of the steamers, to see the bags belonging to the various offices flung up into the air and seized by their expectant owners.

The year 1893 will be remembered for many years for the exceptional spell of cold which visited this colony. The oldest natives and residents remembered nothing of the kind and had never seen ice and sleet and snow in Macao. This severe weather not only caused much misery among the poor classes, but killed the crops of vegetables and fruits, and so brought ruin upon many who are dependent upon their products for a living. Severe cold.

Influenza, too, spread freely among the foreigners and natives in the autumn. And of the poor Chinese who were ignorant of the proper treatment many succumbed to this fashionable disease. Influenza.

The greater part of the small coins in circulation in this colony are such as are made in the mint in Canton. Indeed, it is but seldom that any Hong-Kong 10-cent pieces or 20-cent pieces are come across. Hong-Kong 5-cent pieces are, however, more common. Subsidiary coins.

A source of revenue which has come into great prominence of late is that of stamps. This demand for stamps is most remunerative for Macao; for no sooner is an issue out than it is purchased by residents for themselves and their friends abroad. In fact, I have myself endless applications from different countries for stamps of this colony. Stamps.

Fall of silver
and its effects.

During the last 12 months the dollar has fallen from 2s. 8d. or 2s. 9d. to something like 2s. 2d. The uncertain and fluctuating exchange and the depreciation of silver exercised a very adverse influence upon trade, especially on imports, although the decline has not come quite in the nature of a surprise, and most business people have, to a certain extent, been able to provide against it. But while imports were detrimentally affected, exports have received comparatively little compensation as yet.

The introduction of a gold standard for India, however, caused at first something of a panic in Macao among the Europeans and Indians, and the prices of many imports went up at once. The contrary result took place in some exports. In tea, for instance, prices went down for a time. Whether because it was to induce merchants to buy, or because merchants would not go in for any purchases, or because the fall of the exchange proved beneficial, I have not been able to ascertain. Any how, the effect of cheap silver on the exports of Macao is sure to be beneficial and foreigners will share in the profits. To the Chinaman in the interior, whence the exports come for shipment to Hong-Kong, a dollar is a dollar still, whether its value in the London bullion market be 2s. or 5s., as its purchasing power remains, as far as they are concerned, but little affected. But in Macao, as in the open ports of China, the Chinaman watches the course of the exchange, and is to a degree guided in his operations by it. Such being the case, it will be interesting to see whether the artificial value of the rupee will or will not favour Macao teas in the competition with the Indian teas, whether the decline of this trade, once so important, will be arrested or at least retarded, and whether the silk business will receive a stimulus together with the other articles of export from this colony. For the present the outlook for tea at least is very gloomy, and would seem to require a more powerful impetus than that likely to be given to it by the depreciation of silver. Meanwhile, the immediate results of the fall have been :—

1. The decrease in the imports from England and India.
2. The rapid rise in the prices of all imports, and even in the case of stores, &c.
3. The import of cheap and inferior goods from Germany and elsewhere.
4. The considerable increase in the import of Japanese goods of all kinds.

Bombay
goods.

Imports from
England.

As regards imports from Bombay, the unfavourable rates put a stop at once to the purchase of various goods manufactured in India, which found a ready market here. These consisted mostly of hosiery, cotton goods, and fancy articles. The imports from home were not as yet as severely affected as extra stocks were laid in by the Chinese in anticipation of heavier falls, and as the British Indians made their remittances to London through their agents in Bombay. By these indirect operations they were of course able to obtain the benefit of the favourable exchange of 15 rs. to a pound. They have thus, by dint of economy and frugality, managed to effect pretty good profits.

Referring to the rise in imports the effect has been that living has become dearer in every respect.

The import of cheap articles in Macao is a matter of necessity as the majority of the people have little to spend even on clothing, not to speak of luxuries and fancy articles. Hence the rapid rise in Japanese goods. Already various shops are getting well stocked with them. And, as the articles sell at low prices, they are often chosen in preference to European goods. The articles from Japan at present consist of curios, cotton cloths, blankets, flannels, hosiery, soaps, lamps, tea kettles, matches, hats, umbrellas, gladstone bags, silks, and such like. To give an idea of the cheapness, I may say that umbrellas of European pattern cost 30 c. to 1 dol. (11*d.* to 2*s.* 2*d.*), and cotton crapes 1 dol. to 1 dol. 20 c. a piece of 20 yards, that is 2*s.* 2*d.* to 2*s.* 7*d.* These are of fine texture and nice appearance so that they are much appreciated by Chinese and Europeans, and worn as dresses and shirts. Indeed, the competition of Japanese goods is sure to become keener in course of time, as, besides the depreciation of silver, there are other advantages which work in their favour. These may be summarised as follows:—

1. The proximity of Japan to China.
2. The consequent low rates of freight and other incidental expenses.
3. The cheaper labour procurable in Japan than in Europe.
4. The smaller profits with which the Japanese manufacturers content themselves than their competitors in foreign countries.

The greater, therefore, the fall in silver, the larger will be the demand for Japanese goods of all kinds.

TIMOR.

Imports and Exports.

The imports were last year 123,130*l.* against 115,260*l.*, but the exports were below 1892 by a good deal, probably on account of bad crops. Nothing, however, can better testify to the valuable richness of this sister colony than the gradual strides its imports and exports are making; much though the island languishes under distinct drawbacks from want of enterprise, want of development and lack of funds, and direct communication and sanitation. The gold supplies are still obtained from simple washings. The petroleum wells remain unworked, and the soil is in need of hard-working labourers to turn its richness to good account. The natives are too indolent to do much in the way of cultivation. And, as far as petroleum goes, they fight shy of the burning streams. Indeed, they look with awe and reverence upon the flames as they hold them to be of divine origin. So tenaciously do they hold to this superstition that when the Governor, some time ago, asked several of the natives to point

Articles must
be cheap.

Japanese
goods.

Gold.
Petroleum.

out the wells to him and his party, they flatly refused, and only did so when persuaded by the bishop and priests, who, as usual exercise a vast influence over the benighted indigenes. In order, in fact, to dispel their fears they went so far as to extinguish some of the flames in their presence. These streams of petroleum ignited, presumably, by some accident, and now burn without intermission.

Other
resources.

Nor have any steps been taken to develop any of the other resources of the island much though the concessionaires have strained every nerve to obtain the necessary capital. But the state of local finances is so critical, after the great boom in Hong-Kong, and the very status of silver so precarious that their endeavours to raise money both in Hong-Kong and in England have so far proved futile. The conditions under which the money is to be raised is, I fancy, a difficulty in the way, for, as according to the policy of the Portuguese Government, no foreigner can, as a rule, hold any concession, the present privileged few are to exercise full control, and monopolise the entire management. In the same way no foreign medical man is allowed to practice in Timor as in any other Portuguese colony, unless provided with a diploma from Lisbon. These considerations have, therefore, prompted me to dissuade several British engineers, farmers, and doctors, who applied to me for information, from settling in the island unless they could secure a recognition of their rights and the necessary permission to exercise their professions.

Local
exchange.

At the time when the reduction in the exchange was effected in Macao the florin, which constitutes the currency in Timor, was fixed at 360 reis. Many residents and others both in Macao and Timor have, in fact, benefited their purposes by the exchange. When silver began to get depreciated and remittances home became costly and ruinous, pounds sterling were purchased from the Arabs and tradespeople at 6 dol. each. This operation was highly satisfactory, as no fewer than 8 dol. and more had to be paid in Hong-Kong and Macao for 1*l*. The demand, however, put up the rate in time, but never on a level with the exchange here. It would appear that in the case, for instance, of a transaction from this colony dollars are converted into florins in Timor. Then with the florins gold is bought, and these florins are next taken to the Dutch colonies and turned into gold again at a profit. Hence it occurs that the operation turns out to be remunerative for all parties interested in it.

Towards the close of the year cholera morbus broke out, which, after playing havoc among the natives, attacked several of the foreign residents. The outbreak is, it is said, due to the insufficient inhumation of the bodies of the men who fell in the last guerilla with the Government troops. This small war was rendered necessary by the insubordination of one of the petty potentates who exercise their rule under Portuguese control. The naval and land forces succeeded at length in reducing the refractory State to order, and in capturing the petty king and his consort. This audacious sovereign is now condemned to expiate his sins in bondage for life.

Shipping.

The vessels that visit Dili are still restricted to those which call from Macassar and other Dutch colonies on their way to the settlements in Dutch Timor. Besides these, a British vessel still touches once a month on her way to Australia, under arrangement with the Macao authorities, for the carriage of Government passengers and supplies.

The trade, both import and export, is consequently monopolised by the Dutch vessels, which carry most of the coffee and natural products to Batavia, whence they are shipped to Europe as of Dutch extraction to the detriment of the Portuguese portion of Timor, which does not even get the credit of growing a blade of grass, much less first-rate coffee.

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DIPLOMATIC AND CONSULAR REPORTS ON TRADE
AND FINANCE.

ROMANIA.

REPORT FOR THE YEAR 1893

ON THE

TRADE OF THE DISTRICT OF THE CONSULATE-
GENERAL OF GALATZ.

REFERENCE TO PREVIOUS REPORT, Annual Series No. 1170.

*Presented to both Houses of Parliament by Command of Her Majesty,
APRIL, 1894.*

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ROUMANIA.

GALATZ.

Consul-General Sanderson to the Earl of Kimberley.

My Lord,

Galatz, March 5, 1894.

I HAVE the honour to forward my Report on the Trade and Commerce of Galatz for the year 1893, together with Reports from Vice-Consuls Vecqueray, Churchward, and Zohrab, on the Trade of Sulina, Braila, and Kustendjie during the same period.

I have, &c.

(Signed) PERCY SANDERSON.

*Report on the Trade and Commerce of the Consular District of
Galatz for the Year 1893.*

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Shipping and Navigation.

General
shipping in
the Danube.

The number of vessels of all nations which cleared from the Danube at Sulina during the year 1893 was 1,801 of 1,893,506 tons (Suez Canal measurement), showing an increase of 269 vessels and 466,419 tons as compared with 1892, and an increase of over 354,000 tons as compared with the largest total hitherto, that is to say, in 1890. Of these 233 of 25,911 tons were vessels of 200 tons and under, showing a decrease as compared with 1892 of 25 vessels and 1,349 tons, while sailing vessels, 403 of 84,770 tons, show a slight decrease in numbers but an increase in tonnage.

British and
foreign
tonnage.

The tonnage under the British flag amounted to 905 vessels of 1,287,762 tons, the largest on record; as compared with 1892 there is an increase of 267 vessels and 421,004 tons, while the proportion to the whole has risen from about 60 $\frac{1}{4}$ per cent. to 68 per cent.

Vessels under the Greek flag maintain the second place with 249 vessels of 242,707 tons, showing an increase as compared with 1892 of 25 vessels and 43,216 tons, but a decrease in the proportion to the total from about 14 to 12·8 per cent. Next in order come Turkish vessels, 321 of 69,584 tons, a diminution of 19 vessels and 6,491 tons; Austro-Hungarian, 63 of 62,244 tons, a decrease of 26 vessels and 20,560 tons; Norwegian, 36 of 40,816 tons, a decrease of 6 vessels and 8,279 tons; Russian, 104 of 43,812 tons, an increase of 16 vessels and 10,460 tons; French, 35 of 43,533 tons, an increase of 5 vessels and 4,356 tons; Italian, 37 of 38,845 tons, a diminution of 8 vessels and 11,203 tons; German, 26 of 32,235 tons, an increase of 5 vessels and 5,950 tons.

Average
tonnage.

The average tonnage of British vessels was close on 1,423 tons, and that of the shipping in general, including all the small sailing vessels, 1,051 tons, showing an increase in both cases. The proportional tonnage of vessels of over 1,000 tons net register was 85 per cent. of the whole. Comparatively fewer vessels loaded at Sulina than at any time since 1872, when the average tonnage of the whole of the shipping was under 250 tons; the proportions in 1893 were 16·62 per cent. at Sulina and 83·38 per cent. at up-river ports.

State of the
river.

The Danube was frozen over on the 26th December, 1892, and in the month of January, 1893, the frost was very intense, with heavy falls of snow; the thaw took place at the end of

February and the first vessels began to arrive up-river on March 9. The spring flood was rather above a medium, having reached 9 feet 11 inches above low-water mark at Toultscha on April 14. It continued up to the first week of July when the water began to fall rapidly; on October 4 there was only 1 foot 1 inch above low-water mark at Toultscha and up to the end of the year there was no very sustained rise. The river was not frozen over till January 4, 1894. The minimum actual depth of water over the shoals from Galatz downwards was 17 feet 3 inches in September, but the shoal at Tziglina, between the 94th and 95th miles, that is to say between Galatz and Braila, was very troublesome; the navigable channel had to be marked out by buoys in May, there was a slight improvement in the depth and general conditions in July, but in September the depth decreased rapidly till at one time there were only $13\frac{1}{2}$ feet. A channel was dredged of the requisite depth, and there is every probability that works will be undertaken during the present year to get rid of this shoal, which forms whenever the current of the Sereth is stronger than that of the Danube. A cutting in a direct line between the 18th mile and a point $8\frac{1}{2}$ miles above Sulina was completed in December; this shortens the course by about 4 miles and is the means of avoiding three awkward curves.

The depth over the bar at the Sulina Mouth was, as in past Sulina Mouth. years, $20\frac{1}{2}$ feet as a minimum, but even with this depth serious loss and inconvenience is constantly incurred by vessels drawing more than 20 feet of water when fully loaded, as they have to go out into the open roads to complete their cargo. If the weather is unfavourable they may be exposed to considerable danger, the lighters cannot come out to them, and cases have occurred of their being obliged to proceed to sea without having taken all their cargo on board. An endeavour will be made by the European Commission of the Danube to obtain a greater depth of water over the bar by means of dredging. A large dredger has been ordered for this purpose, and it is hoped that it may be at work by October of the present year.

The entries of British shipping at Galatz during 1893 amounted to 340 vessels of 399,358 tons, as compared with 278 vessels of 309,735 tons in 1892. Of these 340 vessels 199 were fully or partially laden, 98 of 97,554 tons brought cargoes from Great Britain or the colonies, namely, 47 general cargoes, 47 cargoes of coal, and 4 of rice. Of the remaining vessels 9 brought general cargoes from Antwerp and London, 12 general cargoes from Antwerp, and one a general cargo from London, Hamburg, and Constantinople. British shipping at Galatz.

The returns from Braila show that 654 British vessels of 800,057 tons entered in the course of the year, and of these 148 of 103,435 tons brought cargoes from Great Britain or the colonies, and 13 cargoes from Belgium. The total entries in 1892 were 438 British vessels of 510,942 tons. At Braila.

The entries of British vessels at Sulina, which in 1892 were 393 of 480,450 tons, amounted in 1893 to 515 of 668,917 tons: At Sulina.

51 vessels of 48,586 tons brought cargoes from Great Britain or the colonies, and one a general cargo from Belgium.

At Kustendjie. The entries of British shipping at Kustendjie have also risen from 44 vessels of 46,411 tons in 1892 to 80 vessels of 86,661 tons in 1893, and of these 4 vessels of 3,857 tons brought cargoes from Great Britain or the colonies.

Freights. Freights were somewhat better than in 1892. Commencing at 10s. 9d. to 11s. 6d. per ton in March, they rose gradually till 14s. 6d. per ton was reached in May. During June, July, and August business was slack, and rates fell, but there was a recovery in September. The highest point, namely, 19s. per ton, was reached in October, and freights closed in December at about 18s. per ton. The average, taking month by month, was about 14s. 2d. per ton, as compared with about 11s. 9d. per ton in 1892. From Sulina the highest rate was 14s. 6d. per ton in October, and the lowest 8s. 6d. per ton in March. The average taken in the same way shows 10s. 11d. per ton, as against 9s. 8d. per ton in 1892.

Lighterage. The charge for lighterage was also somewhat higher than in 1892, having varied between 4d. and 7d. per quarter till September, and from that time till the end of the year between 6d. and 8d. per quarter. The shoal at Tziglina created a demand for lighters, and they were also in request for the storage of grain at Sulina for export during the season when the Danube is closed by ice.

Trade and Commerce.

General. The exports were on a larger scale than in 1892, but prices of grain again ruled very low, and the complaint is pretty general that the year 1893, with a considerably increased business, both in imports and exports, has yielded but little profit.

Imports.

British. The imports from Great Britain have been larger in 1893 than in 1892.

Coal. The import of coal from Great Britain through Sulina amounted to 290,650 tons, or about 30,000 tons more than in 1892.

Manchester goods. As regards Manchester goods, the position is much the same as in 1892. A considerable quantity of cotton prints have lately been imported from Alsace.

Iron. As regards hoop-iron and iron for horse-shoes the English market appears to have gained ground as far as Galatz and Braila are concerned. In the interior of the country, however, the cheaper through rates of transport by rail cause the preference to be given to Germany.

Tin-plates. This year a large proportion of the roofing sheets was imported from Germany and Belgium, where the quality was said

to be better than in England when compared with the price. In tin-plates, however, the British market seems to hold its own.

Stationary engines and threshing machines came for the most part from England, reapers and binders from America. Agricultural machinery.

The rolling stock for railways comes almost entirely from Belgium and Germany, but a certain number of railway passenger carriages were procured from Milan. Railway rolling stock.

A good deal of difficulty was experienced by importers of Jute. jute in the course of the year, in consequence of the wording of the tariff, which provided for a tax of 5 fr. per 100 kilos. on very common jute-cloth and sacks made of similar material; while any jute-cloth that did not come under this heading was taxed 40 fr. per 100 kilos. The distinction between the two has been finally established by admitting under the first heading all jute-cloth which does not contain more than 18 threads, including both warp and woof, in any square centimetre of the entire piece, a double thread to count as two threads. This number of 18 threads was adopted as a concession on the original resolution to adopt 16 threads as a criterion. It was found that a piece of cloth woven on the basis of 16 threads would here and there contain 17 threads in a particular centimetre of its entire length, and the extra two threads were granted to meet a blemish of this kind. The number 18 is likely to be very strictly adhered to, and it would be advisable that manufacturers and importers should adopt the basis of 16 threads if they wish to avoid trouble, and the possibility of eventually having to pay 40 fr. duty instead of 5 fr. per 100 kilos.

In this article the competition from the Italian, Dutch, and Belgian markets is still maintained.

It was mentioned in the report for 1892 that the high rate of duty for linseed oil was likely to lead to an English factory being established at Galatz. This factory confined its operations to importing the unboiled oil, boiling it and placing it on the market, and the effect has been a very large falling-off in the importation of boiled linseed oil. At the close of the year, when the tariff was changed in connection with the Commercial Treaty with Germany, the duty was reduced from 50 fr. to 35 fr. per 100 kilos., which may lead to a revival of the import both from Great Britain and Germany. The factory in question is now, however, setting up crushing machinery with a view to utilising the linseed grown in the country. Linseed oil.

There has been a large import of cement from Great Britain during the past year. The duty on this article has now been raised from 75 c. to 1 fr. 50 c. per 100 kilos.; but it is not apprehended that this will have any great effect on the import. Cement.

Exports.

The export of grain from Roumanian ports on the Danube through Sulina during 1893 exceeded 14,000,000 quarters, as compared with about 9,400,000 quarters in 1892. The bulk of the (1704)

increase has been in maize, upwards of 7,000,000 quarters, as against about 3,000,000 quarters in 1892. There was a falling-off of about 600,000 quarters in wheat, but an increase in rye, barley, and oats.

Flour. The export of flour increased by about 1,000 tons; there was also an increase in coarse flour and bran.

Timber. Timber remained much about the same as last year. There was a decrease in the export of planks, and that of wine and spirits was quite insignificant.

Planks. A short table of the principal articles of export by the Danube through Sulina is annexed.

Wine and spirits. In addition to these there was a considerable export of hay overland, purchases having been made for both the French and the German Governments. There was difficulty in getting this hay pressed, and the quality is described as not being of the best. The price ran about 4*l.* per ton delivered at the frontier.

Table. Two consignments of eggs were also forwarded from this country to Great Britain; one of 128 cases in May, and another of 138 cases in June, the total weight being about 26 tons. It is probable that the bulk of these eggs came from the Dobrudja, and that these consignments were in the nature of an experiment.

Eggs.

Exchange.

Exchange on London. The exchange on London averaged about 25 fr. 27 c. for bills at sight, and 25 fr. 11 c. for 3 months' bills. The highest points were for drafts at sight, 25 fr. 44 c., in August, and for 3 months' bills, 25 fr. 24 c., in February; the lowest, 25 fr. 14 c. for sight bills in April and July, and 25 fr. for 3 months' bills in September. These rates were somewhat higher for sight bills than in 1892, but much about the same for bills at 3 months.

Stocks and shares. At the close of the year 1893 the quotation for the 4 per cent. Government stocks were a shade higher than at the corresponding period of 1892; shares of insurance companies were also quoted higher, but as regards other stocks and shares there was for the most part a slight depreciation.

Gold. There was no premium on gold, but, as in 1892, the Napoleon was somewhat scarce, and when this particular coin was required a slight premium had often to be paid.

Silver. Towards the end of the year there was a scarcity of silver; difficulty was experienced in obtaining change for notes of 100 fr., and charges varying from $\frac{1}{2}$ per cent. to as high as 3 per cent. were made at Galatz.

Agriculture.

General remarks. As in the previous year, autumn sowing was carried on under unfavourable conditions, owing to the prevailing dry weather. Snow fell early, but in many districts high winds swept it away from the fields, leaving the ground exposed to the frost, which

was unusually severe. The weather throughout the year was exceedingly changeable, and on two or three occasions violent storms of rain and wind caused the gravest fears to be entertained. In the first part of February milder weather set in, and spring sowing was begun. In March all work was stopped by rain and snow, and further floods in the early part of April greatly retarded the autumn-sown crops. The second week of May was marked by one of the most violent storms of the year, and the heavy rain, together with the melting snow, caused inundations all over the country. It was found, however, that, as the flood was very quickly carried off, no great harm had been done. More floods and gales occurred in the month of June, which did greater damage, part of the crops being laid. It became evident, while all the crops were very much behindhand through want of sunshine, maize was particularly backward. Harvesting commenced about the middle of July, and was carried on under favourable conditions. Autumn sowing was again greatly hindered by want of rain, except in parts of Moldavia, where the conditions were more favourable.

The crop of wheat was a fairly average one, though slightly inferior to that of last year. It is estimated to have produced 21,184,260 hectolitres, or 58,256,715 bushels, about 18 bushels per acre. Wheat.

The crop of rye yielded 7,463,940 bushels, about 21 bushels per acre, a great advance on last year's crop of 4,210,000 bushels. Rye.

The barley crop was estimated at 34,545,445 bushels, 23½ bushels to the acre, and that of oats at 10,803,665 bushels, or about 24 bushels to the acre. Barley.
Oats.

Maize is calculated to have yielded 70,559,665 bushels, about 14 bushels per acre. Maize.

The colza crop was very seriously injured by the storms in spring, and the yield was exceedingly small. Colza.

Hay was unusually abundant, and of good quality throughout the country. It was largely exported to supply the deficiencies in France and Germany. Hay.

All fruit trees suffered severely from the extreme cold in spring, and the yield was practically nil. Fruits.

The vines in common with other fruit trees were greatly injured by frost, and the grapes were few and ill conditioned owing to want of rain in the autumn in Moldavia and Wallachia, and to too much rain and cold in the Dobrudja. A marked increase in the price of wine has resulted. Vintage.

The Ministry for Agriculture again this year imported a quantity of hemp and flax seed which was distributed gratuitously to peasant cultivators, and at cost price to those who can afford to pay for it. Hemp and flax.

No cases of cattle plague have been reported during the year, but there have been cases of foot-and-mouth disease. Cattle.

To encourage the culture of silk worms, the Ministry of Agriculture imported from Italy 1,500 grammes of eggs of a

superior quality producing white cocoons. These eggs were distributed gratuitously in March to persons desiring to cultivate them under the conditions that an equal quantity should be returned to the Government in July, and that a report should be made of the results obtained.

Bee-culture.

In former years bee-culture was extensively practised in Roumania, the climate and vegetation being found extremely favourable. It has, however, of late been almost entirely neglected.

This is said to be owing to the fact that while great improvements have been made in the method of culture in other countries, only the old methods were known in Roumania.

To remedy this state of affairs, the Ministry of Agriculture has brought forward a project by which a specialist should be granted about 700 acres of State land in the district of Roman for a period of 10 years with a view to establishing a model school of apiculture.

He would be bound to construct, at his own expense, the necessary buildings, bee-hives, &c., at a cost of about 1,000*l.*, which at the end of the period would become the property of the State. He would further have to lodge and instruct 10 pupils nominated by the Ministry yearly, and generally to give anyone in the country the benefit of his experience and advice.

Public Health.

Cholera.

Although Roumania was free from cholera in 1892 this was not the case in 1893, when all the Roumanian ports of the Lower Danube, viz. :—Braila, Galatz, Toultscha, and Sulina were affected by this epidemic. During the hot weather there are always a certain number of cases of cholerine, and the first case which occurred at Braila on July 7/19 passed, as it very well might do, as a case of this kind. The man, a Greek, had eaten plentifully of cucumbers and drunk water direct from the Danube; he died in three days. He had been employed in discharging coals from the British vessels "Jersey" and "Tripoli," both from Cardiff with clean bills of health, and no case of infectious disease occurred on board these vessels during their stay in the port of Braila. The next cases that occurred were those of the mother-in-law and sister of the above who were taken ill on July 13/25 and July 16/28, and died on the 16/28 and 18/30 of the same month; the wife was not attacked. The next four cases seem to have had no connection with the above, while the eighth case was that of a sailor of the British ship "Pendarves" from Port Said; two labourers working on board this vessel were attacked, and the report of the Director-General of the Sanitary Service states that from this time forward it is easy to trace the communication of the disease to other labourers who lived together, took their meals together, and one and all drank water drawn from the Danube in proximity to this vessel. The same report, however, states that it is difficult to account for the first cases. The most

Braila.

probable theory being that the water of the Danube had become contaminated. Unhappily no bacteriological examination of the water was made during the course of the epidemic, which increased up to the end of August, and then gradually diminished till it was practically extinct about the middle of October. The greatest number of deaths reported was 17 on August 15, and of new cases 16 on August 28. Between July 19 and October 20 the number of cases registered was 469, with 290 deaths and 179 recoveries. The population of Braila is about 47,000. At Sulina the first case of cholera occurred on July 22/August 3, it was that of a Turkish labourer who had been working on board the steamship "Venice" from Marseilles, and since cholera existed at Marseilles at the time, the medical officer of the town was inclined to attribute its origin to this vessel. But as the Director-General of the Sanitary Service points out in his report, this is scarcely likely inasmuch as the journey had taken 12 days, this vessel in common with 16 others which came from the same port in the course of 3 weeks was submitted to a medical examination and to measures of disinfection, and they none of them had any cases of cholera on board whether on leaving Marseilles, at the time of their arrival, or during their stay at Sulina. The more probable cause would be the contamination of the water, and this is borne out by the fact that the second case was that of a Russian woman who lived in an entirely different part of the town from that to which the labourers resort, and who did not come in contact with them. In a town like Sulina which has no other water supply than the Danube, it is extremely difficult to get people to take the necessary precaution of boiling all water for drinking purposes. In the case of a British vessel at Sulina some of the sailors insisted on drinking the Danube water direct, instead of boiled and filtered water which was provided for them, and several cases of cholera resulted. On shore there was much the same feeling, the different directions and precautions prescribed by the municipality were neglected, and in many instances cases of cholera were concealed as long as it was possible to do so. The population of Sulina is about 4,000, and this number is increased by about 2,000 workmen and labourers who come during the season when work is abundant and return to their own country for the winter. As soon as cholera broke out, a panic ensued and there was a very large exodus, so that the following figures must be taken to apply to a population of probably less than 4,000. Beginning with 1 case on August 3, there were 26 new cases on the 7th, and 38 (the highest point reached) on the 9th of the same month, there was then a gradual diminution up to the middle of September and few new cases from that time up to the middle of October when the epidemic may be said to have ceased. In all there were 336 cases and 164 deaths registered; 88 of these cases were treated at the seamen's hospital, of these 34 died and 54 recovered. Amongst British shipping there were 20 cases and 10 deaths. The position of this hospital makes it unfit for the treatment of a large number of cases of infectious or contagious diseases, and

a new one on a different site will be established in the course of the present year.

Galatz. At Galatz the first case occurred on August 5, but recovered without professional assistance; the first death certified as from cholera was on August 12. Galatz has the advantage over Braila and Sulina of a good supply of filtered water, the houses do not stand so close together as in the latter towns, and the general conditions are somewhat more healthy. In almost all the cases which occurred unfiltered water had been drunk direct from the Danube. The greatest number of new cases was eight on August 18, and the total number of cases up to the middle of October when cholera ceased was 181, of which 26 were found to have died before medical assistance had been called in. Of the 155 cases treated, 95 died and 60 recovered. The population of Galatz is over 60,000.

Toultscha. At Toultscha, the first two cases of cholera on August 12; they were persons living in different streets, they did not go down to the port and they had no relation with people coming from Braila, Galatz, or Sulina. They were in the habit, however, of drinking the Danube water neither boiled nor filtered. The greatest number of new cases was seven on August 19, and the total number of cases among a population of about 17,300 was 35 with 27 deaths up to September 17, after which no cases occurred.

Town of Galatz.

Waterworks. For several years past the main streets have been supplied with filtered water by an English Company whose works are on the Danube, a short distance above the town. It is now proposed to add to these works so as to give greater pressure, which is very desirable, and to extend the system of supply to parts of the town which it has not hitherto reached.

Lighting. A few electric lamps were set up last year, but the bulk of the lighting is carried out by means of petroleum. A concession has been granted and a contract signed for lighting the whole of the town by means of gas and electricity, and hopes are held out that the work will be carried out in the course of this summer.

Telephone. The telephone is in use in the town itself; last year communication was established with Braila, and latterly telephonic communication has been extended to Bucharest.

General Remarks.

Changes of tariff. The conclusion of a commercial treaty between this country and Germany at the close of the year, necessitated a proposal being made to the Chambers for the adoption of the modified rates of duty which were provided for by this treaty. Advantage was taken of this opportunity to raise the duty on cement from 75 c. to 1 fr. 50 c. per 100 kilos., the impression seems to be,

however, that this duty is not sufficiently high to check imports to any material extent. Export duties were at the same time imposed on walnut wood, with the exception of that prepared for veneering 2 fr. per 100 kilos., and walnut wood, half wroughts, 3 fr. per 100 kilos. Generally speaking the changes bear upon 108 articles of the tariff, and as regards 73 of these the change is confined to a modification of the text and of the explanatory notes. In the case of alcohol (Art. 177) the duty has been raised from 100 fr. to 120 fr.; hosiery, flax or hemp mixed up to 20 per cent. with other common textiles (Art. 327) the increase is from 160 fr. to 380 fr., and cement as above stated is now submitted to a duty of 1 fr. 50 c. instead of 75 c. The import of silver or bronze money not being legal tender in Roumania (Arts. 507*b* and 509) is now prohibited. In the case of the remaining 30 articles the duty has been reduced on 19 in their entirety, on 10 as regards certain categories, and in the case of Art. 326. Tissues of flax and hemp mixed with other textiles to the exclusion of silk, some of the categories (of which there are now five) are liable to a lower duty than formerly, others to a higher one.

RETURN of Principal Articles of Export from Roumanian Ports
on the Danube through Sulina during the Years 1892-93.

Articles.		Quantity.	
		1893.	1892.
Wheat	Quarters ..	3,350,991	3,995,172
Rye	" ..	707,025	575,037
Maize	" ..	7,127,728	3,053,376
Barley	" ..	1,896,552	1,193,270
Oats	" ..	782,203	251,106
Haricot beans	" ..	104,462	129,714
Millet	" ..	51,078	40,573
Rapeseed	" ..	48,377	159,527
Linseed	" ..	10,129	10,574
Hempseed	" ..	46,124	3,518
Flour	Tons ..	16,996	15,945
Coarse flour and bran	" ..	4,865	3,468
Timber	Cubic feet ..	7,683,142	7,656,300
Planks	Number ..	1,407,252	1,935,129

SULINA.

Mr. Vice-Consul Vecqueray reports as follows:—

Shipping and Navigation.

The total number of vessels of all nationalities which loaded entire cargoes at Sulina during the years 1893–92 was:—

	1893.		1892.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.
All nationalities ..	224	314,725	205	263,245

British
vessels.

British vessels which loaded entire cargoes at Sulina during the years 1893–92 were:—

	1893.		1892.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.
British	179	270,671	153	218,113

Other
nationalities.

Of other nationalities, the number of vessels that loaded at Sulina during the year 1893 were:—

Nationality.	Number of Vessels.		Total Tons.
	Sailing	Steam	
Austrian	1	2	2,081
Spanish	..	1	1,092
French	..	1	1,251
Greek	..	19	26,682
Dutch	..	1	1,163
Italian	..	4	5,085
Norwegian	..	4	6,013
Turkish	11	1	787

British
vessels
completing
in roads

Of the 179 British steamers that loaded at Sulina during the year, 117 completed their cargoes in the roads.

Exports.

In 1893 exports from Sulina were:—

Articles.					Quantity.	
Wheat	..	..	..	..	Quarters	318,200
Rye	..	..	..	..	"	65,092
Maize	..	..	..	..	"	1,262,175
Barley	..	..	..	..	"	218,548
Oats	..	..	..	..	"	17,080
Haricot beans	..	..	..	..	"	5,961
Rapeseed	..	..	..	..	"	6,638
Linseed	..	..	..	..	"	2,156
Timber	..	..	..	..	Cubic feet	112,395
Miscellaneous	..	..	..	..	Tons	57

Imports.

It is impossible to obtain any reliable statistics as to the Coal imports into Sulina. About 290,650 tons of coal were, however, imported into the Danube through Sulina in the course of the year 1893, as compared with 258,512 tons in 1892.

Freights.

Freights from Sulina remained low till the month of September, varying from 8s. 6d. to 10s. 6d. in January and February from 7s. 6d. to 10s. 3d. in March and April; and from 9s. to 11s. 3d. in May, June, July, and August. In September they rose to 13s. and 14s., and reached 16s. in October, but declined again in November and December from 15s. 3d. to 10s.

Winter Shipments.

A much larger quantity of grain than usual has been sent to Sulina in Schleppts for shipment during the winter months, and it is not improbable that upwards of 100 steamers will have been loaded at Sulina before the Danube becomes again open to navigation.

The 1890 Danube Charter-party Ice Clause.

There seems to be much misapprehension on the part of British shipowners as to the interpretation of Clause 11 of the 1890 Danube Charter-party. This clause reads as follows:—“Except as herein provided, detention by frost or ice from Braila down to Sulina, also detention by quarantine, shall not count as lay days.” Generally, the printed words of Clause 11 in the body of the charter-party, “from Braila down to,” are erased, and

the single word "at" substituted for them. The clause then reads, "Except as herein provided, detention by frost or ice at Sulina, also detention by quarantine, shall not count as lay days."

An extra clause is generally added in writing at the bottom of the charter-party to the effect that the cargo shall be ready at Sulina on ship's arrival, such a clause, for instance, as "Charterers guarantee the cargo in lighters at Sulina awaiting steamer's readiness."

Now the port of Sulina is officially recognised as extending to three miles from the mouth of the river. As a rule in winter the river is frozen right across from bank to bank above the second mile, and, though there is usually a channel in mid stream below the second mile, lighters lying on either side of the river are generally frozen in between the first and second miles.

Most owners appear to think that the clause which stipulates that the cargo shall be at Sulina for steamer's readiness makes it incumbent on the charterer to have the lighters free of ice and to bring them alongside the steamer. Clause 11 of the charter-party is however here made use of by the merchant. The port, as has been said, extends up to the third mile, and nearly every winter lighters are lying two and three and even four abreast on either side of the river from the first to the second miles. These lighters are in the port of Sulina, and are, therefore, "ready at Sulina," according to charter party. If they are frozen in, as is nearly always the case, the merchant is covered by Clause 11 of the charter-party, "detention by ice at Sulina, &c." Thus the steamer arrives at Sulina, the merchant tells the master "there are your lighters." The master finds them frozen in somewhere between the first and second miles, this one here and that one there. He has either to incur the expense of cutting them out or to wait one, two, or even three months till the spring thaw has freed them from the ice.

Now, in some cases the master is told that his cargo is in 3, 4, or even 5 lighters, and although he may have gone to the expense of cutting out, say, two of these lighters, and has brought them alongside his vessel, still the merchant declines to commence loading the ship, and, therefore, counting lay days, until all the lighters are free of ice, on the plea that it is his intention to mix the cargo, and ice is detaining some of the lighters.

Further advantage accrues to the merchant from Clause 11 of the 1890 Danube Charter-party. It often happens that the frost and cold is so intense that it is difficult to find labourers who will work, and the merchant refuses to count such days as lay days, claiming them as "detention by frost."

Shortly put, Clause 11 is wholly in favour of the merchant and against the ship, and yet it is difficult to recommend any remedy. It would be manifestly unfair that the merchant should incur all the expenses arising from ice and frost; equally it is unfair that the ship should be entirely responsible for these

expenses. On the other hand, if, as has been suggested, the charter-party should stipulate that these expenses be divided equally between merchant and ship, it would probably be found that in the end the real weight of expenses would fall entirely on the ship. If no equitable arrangement can be arrived at between merchants and shipowners to meet these difficulties, which are of annual occurrence, the only remedy that appears to be really practicable is for shipowners to hold out for increased freights so as to cover the expenses occasioned by frost and ice.

At the lowest computation the average price for cutting out lighters is 8*l.* per lighter, and as in some cases there are no less than five, and generally not less than three lighters for one steamer, this comes to a serious item, which shipowners should take into consideration before accepting a charter for Sulina during the winter.

In the winter of 1892-93 the port was frozen on two occasions right down to the mouth of the river from bank to bank, and the steamers in port, some 20 in number, were obliged to pay 18*l.* odd each to a contractor who undertook to cut a channel up to the second mile.

BRAILA.

Mr. Vice-Consul Churchward reports as follows:—

For shipping of all nationalities 1893 has proved the record General year, showing a largely advanced total of 1,216 foreign sea-going shipping ships of about 1,219,269 tons.

The increase is most noticeable in the British return, which British in spite of engagements surrendered on account of cholera shipping restrictions and the abnormal obstructions of the sandbank at the mouth of the Sereth, which seriously interfered with Braila fixtures, with a total of 654 ships, of 800,057 tons, shows the great improvement of 216 ships, and 289,565 tons, on 1892, and of 117 ships, of 260,355 tons, on the highest previously recorded figures, those of 1888.

Other nationalities made up the aggregate in proportions as under:—

Nationality.					Number of Vessels.	Tons.	Other nationalities.
Greece	..	..	..	..	124	161,243	
Austria	..	..	..	..	43	43,714	
France	..	..	..	..	35	36,425	
Turkey	..	..	..	..	34	22,252	
Germany	..	..	..	..	25	30,951	
Sweden	..	..	..	..	19	20,800	
Spain	..	..	..	..	6	5,610	
Holland	..	..	..	..	2	2,937	
Belgium	..	..	..	..	2	2,628	
Italy	..	..	..	..	32	29,800*	
Russia	..	..	..	..	66	58,000*	

* About.

To the above must be added for Turkey and Greece respectively 11,895 and 4,857 tons of sailing craft.

Again is to be noticed the steadily advancing Greek tonnage this year of 19 ships; while it should be remarked that the Austrian, Russian, French, Turkish, and Italian tonnage is almost entirely made up by the packets of the Austrian-Lloyd, the Gargarine, Frassiniet, Courtgi, and Italian associations, which did they not, from one source and reason or another, enjoy special facilities, would not retain the tonnage that they show.

The two ships scheduled as Belgian were in reality British, foreign registered to obtain some advantage not obtainable under British regulations.

General
cargoes.

Of the British total, 52 ships brought more or less entire general cargoes, viz., 24 from Liverpool, 15 from London, 12 from Antwerp, and 1 from Middlesbrough, while 68 arrived free laden, mostly from Cardiff; the small remainder consisted of three from Newcastle, and one each from Swansea and Barry. Further three ships brought part cargoes of rice from Rangoon; one 2,151 tons of pitch, another 1,703 tons of cement from Boulogne, and the balance arrived partly laden to fill up or in ballast.

Coal cargoes.
Rice cargoes.
Pitch cargoes.
Cement
cargoes.
Fuel supply.

The free supply for the year brought in British bottoms amounted to 120,882 tons, an excess over that of 1892 of 45,518 tons. These figures would have been still greater had not the Hungarian coal owners, taking advantage of the dislocation of business, and uncertainties caused by the British coal strikes, secured a much larger share in the supply than they otherwise would have, obtaining thus a position for future operations from which it will be difficult to dislodge them.

Briquettes.

Briquettes again were tried, but only with the result of determining their inability to compete with coal at its present price. It is, however, reported that a reduction of 1s. per ton would lead to orders.

Coke.

Only 1,150 tons of coke was imported by British shipping.

During the season, as shown by the statistics of the European Commission of the Danube, Braila exported 11,395,599 quarters of cereals of kinds and in quantities as under:—

Export of
cereals.

Articles.						Quantity.
						Quarters.
Maize	..	..	..	..	..	5,725,106
Wheat	..	..	..	..	..	3,009,936
Barley	..	..	..	..	..	1,366,074
Oats	..	..	..	..	..	641,886
Rye	..	..	..	..	..	417,162
Beans	..	..	..	..	..	99,093
Millet	..	..	..	..	..	47,899
Rape	..	..	..	..	..	44,832
Hemp	..	..	..	..	..	39,454
Linseed	..	..	..	..	..	4,157
Total	..	..	..	..	..	11,395,599

Also 12,963 tons of flour, 4,326 tons of bran, 234 tons of pollard, 50 tons of cheese, 57 tons of wool, 17 tons of nuts, 6 tons of skins, 348 head of cattle, 2 horses, a small quantity of wine, and 1,890 tons of divers goods re-exported or indigenous.

On the last day of the year the grain stocks magazined in the town stood as under :—

Stocks of
cereals.

Articles.						Quantity.
						Quarters.
Wheat	..	..	..	..	..	203,537
Maize	..	..	..	..	..	35,806
Barley	..	..	..	..	..	44,415
Oats	..	..	..	..	..	10,382
Rye ..	..	..	..	..	..	7,731
Beans	..	..	..	..	..	2,424
Linseed	..	..	..	..	..	2,150
Rape	..	..	..	..	..	1,300
Millet	..	..	..	..	..	950

The stocks before the opening of the 1894 season must be immensely increased if the authoritatively-made report "that at least two-thirds of the year's crop remain for exportation," be but half correct.

In the beginning of July the cholera, which the previous year had threatened the country from all points but the south, made its first appearance in Roumania at Braila.

It is said to have been imported by a British ship which had, Cholera. before arrival in the Danube, passed through two quarantines.

This, however, can scarcely be correct, for the case on board was the eighth in the town, the first having occurred 11 days previously. The disease kept steadily increasing until it reached its highest point of 17 deaths per diem in the first week of August, from which date it gradually decreased until final disappearance, having cost 290 lives in the town itself, and 71 in the neighbourhood.

During its course shipping operations were very importantly impeded through want of labourers caused by the stampede of the Turks, who, as a rule, perform the heaviest portion of the stevedoring work of the port. The epidemic cannot be said to have been of a malignant type, taking into consideration the small percentage of loss of life, and the very favourable conditions that Braila affords, even in her best quarters, for the incubation, propagation, and perpetuation of any infectious plague.

Early in August the Tziglina shoal, a sandbank at the point Tziglina shoal. between Braila and Galatz where the Sereth joins the Danube, assumed such proportions as to prevent Braila shipping from passing in anything much over ballast trim, and, in consequence, until a channel was dredged the generality of craft fixed for business at the port found themselves burdened with unlooked-for expenses for lighterage. These expenses in ordinary times are calculated upon the basis of the lowest depth in the Sulina

branch, between which and the Tziglina soundings at one time there was a difference of some 5 feet. As an instance of abnormal lighterage it may be stated that one ship had to lighten no less than 2,200 tons.

To ships fixed to load at two ports the bank was still more costly. They either had to endure a double service of lighterage, or pay for permission to avoid it. It depended upon the charterers for two ports whether or no the craft were loaded down to more than bank draught before going to the second port to complete, and the value of this fact was not lost sight of. The "and/or" insertion in these parts, traditionally regarded as worth the sum it can be made to fetch, had its value considerably advanced by the sandbank.

The "and/or" insertion.

This same "and/or" insertion was during the season as fruitful a source of trouble as ever, and will continue to be so until some very decided definition, capable of being acted upon out here, be given of its value. It cropped up with nearly every coal ship whose charter-party bore the debateable words. The masters invariably applied for Consular advice in the matter, but in no case did a master report the result of having acted upon such advice, although they were specially requested to do so.

Piastre coal freight payment.

Owners no doubt will be pleased to hear that there is at last some chance of that anachronism in the nineteenth century, payment of coal freights on the basis of the Galatz piastre, coming to an end, as the principal firm of agents and charterers in Braila have determined to abandon its practice. Actual piastre payment has long been impossible, and its nominal application has only been feasible through the working of a system of double exchange. The reason for the retention of this cumbrous system is evident enough, but as the same benefit could always have been arrived at by simpler methods, it is remarkable that no serious attempt in that direction has been attempted before.

Lighterage.

While on the subject of modernising ancient methods, the present system of lighterage might well be taken into consideration by those interested. At present the method is to lighten the ship after she has received her full cargo, thus involving a double handling of a portion of it, and in effecting this the detention of the ship for 2 or more days as required. There are, no doubt, as things now stand, many objections to be made against lightening direct into the lighter, but surely in these days of small profits the saving of 2 or more days per ship per trip, and proportionate lighter demurrage, is sufficient incentive to try to arrive at some arrangement to bring a direct system into practice. As a matter of fact there are ships from Braila who do practice it, and as yet no complaint has been heard against its working.

Coal charters.

With regard to coal ships, the experience of the year has shown that owners would do well to be more explicit in fixing the conditions of discharge in their ships' charter-parties, many of which appeared to invest the charterer with the right to treat the ships as coal stores for any period that might be convenient to them.

The latter half of the season was remarkable for the unusual number of demurrage claims presented, disputed, compromised or repudiated, more especially with regard to engagements under berthing notes, which not having the necessary proviso give the ship no lien on the cargo for extra days. In most of these cases the owners are, no doubt, constructively to blame for taking no warning from, and thereby repeating former woeful experiences.

Looking ahead, while the principal British line from Liverpool to Braila will materially increase its regular sailings, it also announces a regular line from Antwerp, calling at the Mediterranean and Black Sea ports as may be required. It may also be noted, that the through agency service in connection with the British lines signalled in last year's report has met with an unlooked for amount of success in its trial year.

The Braila docks still require much to make them the complete success they deserve to be. The complaints during the year of unnecessary detention in discharging, through, it is said, a dock personnel more precise than practical, were many and it would seem justified. Another graver fault showed itself at intervals in not preserving a sufficient depth of water, in consequence of which, vessels well within the fixed draught could not get alongside without difficulty, while others actually grounding in the basin, had to be partially discharged before they could go into berth.

Altogether 1893, record year as it is, is looked upon in Braila as a splendid season spoiled. Its promises were tremendous, but could not be fully realised, as first of all the inundations with consequent damage to bridges embarrassed the communications, then came the English shipping disturbances to diminish engagements, after were felt the effects of the cholera in the same direction, and then the Tziglina bank added its difficulties and further kept off the business that would under more fortunate circumstances have wound up a phenomenal year for the port of Braila.

KUSTENDJIE.

Mr. Vice-Consul Zohrab reports as follows:—

Shipping and Navigation.

The total number of vessels which entered the port of General Kustendjie during the year 1893 was 228 of 189,186 tons. This shipping was distributed as follows:—

Nationality.	Number of Vessels.	Tons.	Remarks.
British	80	86,661	Steam
Austrian	60	68,400	All Austrian Lloyd steamers
French	8	9,746	Steam
German	8	8,610	Steam
Greek	12	5,066	Steam, mostly small vessels from Constantinople
"	12	2,642	Sailing
Italian	1	1,408	Steam
Russian	2	176	Sailing
Swedish	2	1,895	Steam
Turkish	1	400	Steam
"	42	4,187	Sailing
Total	228	189,186	

In comparison with 1892, the year 1893 shows an increase in the general shipping of this port of 62 vessels of 68,763 tons.

British
shipping.

In British shipping the increase has been considerable, the entries of 1893 exceeding those of 1892 by 36 vessels of 40,250 tons. This rise was due chiefly to the large stock of cereals remaining at the expiration of 1892.

Of the 80 British arrivals, 4 vessels entered with coal cargoes from Cardiff, 9 in ballast from the United Kingdom or British colonies, and 67 from foreign ports, 11 with part cargoes to complete here, and 56 in ballast.

The number of vessels which cleared during the year amounted to 84. Of this number 83 left with cargoes—5 direct for the United Kingdom, 49 for Gibraltar for orders, and 29 for foreign ports. The remaining vessel cleared in ballast for a Russian port.

Out of the above 83 vessels, 70 loaded entire cargoes, 8 part cargoes, and 5 having entered to discharge part of their cargoes, left for foreign ports without taking anything here.

Imports.

The difficulties attending the collection of statistics under this head make it impossible to furnish reliable information as to quantities and values.

The demand which has arisen within the last 3 years for modern agricultural implements continues. The supply this year has been furnished chiefly by Great Britain, America, and Germany. Owing to a demand for hay several hand-presses, for forming bales, were imported from England and America.

From Italy have come the engines, machinery, and other appliances, and from France the chemicals, required by a tannery recently established in this neighbourhood. England has supplied a certain number of railway requisites.

Coal and
coke.

7,281 tons of coal and 58 tons of coke were imported from Cardiff.

Exports.

807,898 quarters of cereals were exported during the year. **Cereals.**
Of this quantity 732,444 quarters were carried in British bottoms
as follows :—

Articles.						Quantity.
						Quarters.
Barley	..	..	..	..	..	389,005
Maize	..	..	..	..	..	148,941
Millet	..	..	..	..	..	60,752
Wheat	..	..	..	..	..	51,222
Oats	..	..	..	..	..	38,290
Linseed	..	..	..	..	..	20,138
Rapeseed	..	..	..	..	..	16,855
Rye	..	..	..	..	..	7,241
Total	..	..	..	..	..	732,444

The remaining 75,454 quarters were shipped under the
following flags :—

Articles.						Quantity.
						Quarters.
Austrian	..	..	..	..	..	2,184
French	..	..	..	..	..	724
German	..	..	..	..	..	41,272
Greek	..	..	..	..	..	22,802
Italian	..	..	..	..	..	2,058
Turkish	..	..	..	..	..	6,414
Total	..	..	..	..	..	75,454

About 800 tons were exported to France. Of this quantity Hay.
240 tons were shipped under the British flag. The hay grown in
the Dobrudja is said to make but indifferent fodder.

168 head of cattle and nearly 12,000 sheep and lambs were **Cattle, sheep,
and lambs.**
shipped for Turkey by Austrian-Lloyd steamers.

About 200 tons were exported. The whole quantity went to **Wool.**
England.

Agriculture.

The harvest was abundant, and the crops on the whole good. **Crops.**
Barley was above the average in quantity, but below in quality.
The yield of linseed was smaller than usual.

The cultivation of maize increases yearly ; the crop was good
in all respects. Oats are also grown more extensively than they
were a few years back, and this grain now figures for the first
time in the list of exports.

Public Works.

Up to the present no practical work has been undertaken in connection with the enlargement of the harbour; and the impression is gaining ground here that if the project has not been altogether abandoned, it has, at any rate, been given up for an indefinite period.

General Remarks.

The year began with very severe weather, January being the coldest and stormiest month experienced during the past quarter of a century. The shipping here at the time suffered considerably.

The drought did not extend to this district. Rain fell abundantly. The summer months were exceptionally cool, and the weather towards the end of the year milder than usual.

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AND FINANCE.

RUSSIA.

REPORT FOR THE YEARS 1892-93
ON THE
PROGRESS OF RUSSIAN TRADE.

REFERENCE TO PREVIOUS REPORT, Annual Series No. 1119.

*Presented to both Houses of Parliament by Command of Her Majesty,
MARCH, 1894.*

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RUSSIA.

ST. PETERSBURG.

Mr. Howard to the Earl of Rosebery.

My Lord;

St. Petersburg, February 12, 1894.

I HAVE the honour to transmit herewith a Report on Russian Trade, which has been drawn up by Mr. Law in accordance with the instructions contained in your Lordship's despatch of October 3 last.

I have, &c.

(Signed) H. HOWARD.

Mr. Law to Mr. Howard.

Sir,

St. Petersburg, February 3, 1894.

In compliance with the instructions I have received to report on changes made in the Russian Customs Tariff, I have now the honour to submit a series of Tables showing the course of trade between Russia and the United Kingdom, Germany, and France, as affected by these changes, and also extracts from the semi-official Journal de St. Pétersbourg, giving the decrees, &c., by which these changes have been established. No official Tariff has as yet been published embodying these changes, and it is probable that no publication will be issued until a Russo-German commercial treaty shall have been definitely adopted or rejected.

It has been impossible to produce this report earlier, as the complete Customs statistics for 1892 were not published till January, 1894, and the preliminary report for the first eleven months of 1893 was not issued till the end of the same month.

I regret that it has been impossible to give more complete figures for 1893, but information discriminating between the various countries concerned in the aggregate of trade tabulated, will not be available before December of the current year. Further I must observe that until the introduction of the present system of demanding certificates of origin, it was impossible

to distinguish between trade with the countries bordering on Russia, and trade over the frontiers of those countries, which was really in transit for other parts of the world. Finally I must state that there can be no certainty of complete accuracy in detail in the figures which I have tabulated, as every change in the Tariff has been accompanied by a change in the arrangement of headings of classification adopted in compiling the official statistics, and it has not been possible to follow these changes in every detail. As an instance of the difficulties encountered I would mention that cement, which for a certain period was classified separately, is at another period taken together with other analogous materials, and cannot be continuously traced separately.

Whilst pointing out such unavoidable imperfections in detail, I think, however, it may be assumed that the general course of trade is sufficiently clearly indicated by the figures which I have given, and which have been revised as carefully as possible.

With reference to the difficulty in distinguishing between direct and transit trade, I must specially point out that an important part of what appears as German exports to Russia, certainly consists of French, English, and Belgian goods, imported into Russia over the German frontier, whilst on the other hand, Holland and Belgium are credited with the importation of Russian bread-stuffs which reach the German market *via* Rotterdam and Antwerp.

Experience of the difficulties which have recently arisen in connection with the importation into Russia of British goods, *via* Germany, has drawn my attention to the advantages which would, I believe, be secured for British trade with western Russia and Poland by the establishment of a system of through rates, *via* Libau, to Warsaw, Kieff, and perhaps Lodz and Kharkoff. The port of Libau is practically open throughout the year, and I have reason to believe that the desire to bring traffic to their own railways, would influence the Russian Government to facilitate the establishment of such through rates as I have suggested.

I have, &c.

(Signed) E. F. G. LAW.

Report on the Progress of Russian Trade for the Years 1892-93.

Translations
of Decrees,
Circulars, and
Documents.

Decree
instituting a
double tariff.

Method of
application.

The following is a list of the various decrees, circulars, and documents of which translations are submitted, and by which the recent changes in the Russian Tariff were established:—

1. "Journal de St. Pétersbourg," June 25, 1893. (a) The decree instituting a double tariff, and detailing the changes in the existing tariff, by which it is established.

(b) Regulations published by the Minister of Finance, determining the method of application of the double tariff.

2. "Journal de St. Pétersbourg," July 9, 1893. Text of the Franco-Russian Commercial Convention.
 3. "Journal de St. Pétersbourg," July 29, 1893. Circular from the Finance Minister ordering the application of the maximum tariff to importations from Germany or German colonies, and to importations through Germany, of the products of extra-European countries.
 4. "Journal de St. Pétersbourg," July 30, 1893. Explanations in justification of the application of the maximum tariff to Germany.
 5. "Journal de St. Pétersbourg," July 31, 1893. Decree authorising the Minister of Finance to apply differential tariffs to the importations from any countries which might apply such tariffs to Russian products.
 6. "Journal de St. Pétersbourg," August 2, 1893. (a) Circular by the Minister of Finance increasing by 50 per cent. the tariff of duties on importations from Germany and German colonies.
- (b) Circular from the Customs Department, ordaining the application of special maximum shipping dues to the ships of all countries which treat Russian ships differentially in this respect, and therefore immediately to German ships.
- The following are the Tables appended to the translations of Tables. the documents above enumerated :—
- Table A.—Importations from the United Kingdom, Germany, and France, 1888–92 (principal articles).
- Table B.—Exportations to the United Kingdom, Germany, and France, 1888–92 (principal articles).
- Table C.—Importations from the United Kingdom, Germany, and France, of such articles as were affected by the Russo-French Trade Convention of July, 1893—1891 and 1892.
- Table D.—Exportations from European Russia of more important articles of trade with the United Kingdom, January 1 to December 1, 1892 and 1893.
- Table E.—Importations into European Russia of more important articles of trade with the United Kingdom, January 1 to December 1, 1892 and 1893.
- Table F.—Value of Exports from Russia, January 1 to December 1, 1892 and 1893.
- Table G.—Value of Imports into Russia, January 1 to December 1, 1892 and 1893.

Franco-Russian Commercial Convention. Application of the maximum tariff.

Justification of application of maximum tariff to Germany. Differential tariff.

Circulars.

Table A.—IMPORTATIONS into Russia from United Kingdom, Germany, and France, showing Totals of Principal Articles and Grand Totals, 1888-92.

Articles.	Years.	United Kingdom.				Germany.		France.		Total all Countries.		
		Pounds.	Tons.	Pounds.	Tons.	Pounds.	Tons.	Pounds.	Tons.	Pounds.	Tons.	Tons.
Salt	1888	164,000	2,445	261,000	4,691	990,000	15,968	4,000	65	689,000	1,113	
	1889	147,000	2,371	990,000	15,968	619,000	9,984	..	..	1,405,000	22,661	
	1890	181,000	2,919	511,000	8,726	395,000	6,371	..	..	1,052,000	16,968	
	1891	146,900	2,258	..	..	..	..	..	..	843,000	13,597	
	1892	101,000	1,629	..	..	..	..	..	..	727,000	11,726	
Herrings ..	1888	1,609,000	25,352	1,002,000	15,161	..	..	..	..	4,645,000	74,925	
	1889	1,689,000	31,565	988,000	15,945	..	..	..	..	5,971,000	96,305	
	1890	1,674,000	27,000	1,141,000	18,403	..	..	..	..	5,432,000	87,629	
	1891	1,177,000	18,984	1,012,000	16,323	..	..	..	..	4,841,000	75,548	
	1892	1,742,000	28,097	762,000	12,390	..	..	..	..	6,664,000	107,484	
Coffee	1888	161,000	2,537	171,000	2,758	..	..	..	..	395,000	6,371	
	1889	136,000	2,097	144,000	2,423	10,000	161	..	..	359,000	5,799	
	1890	126,000	2,097	141,000	2,274	26,000	419	..	..	391,000	6,306	
	1891	96,000	1,548	156,000	2,516	38,000	613	..	..	345,000	5,565	
	1892	84,000	1,259	180,000	2,697	27,000	435	..	..	385,000	6,210	
Tea	1888	211,000	3,403	86,000	1,387	..	..	..	..	..	..	
	1889	228,000	3,548	10,000	161	..	..	..	..	1,914,000	30,871	
	1890	247,000	3,984	14,000	226	1,000	16	..	..	1,817,000	30,519	
	1891	156,000	2,419	11,000	177	..	..	..	..	1,965,000	31,794	
	1892	192,000	3,037	..	..	..	..	..	..	2,141,000	34,548	

RUSSIA

IMPORTATIONS into Russia from United Kingdom, Germany, and France, showing Totals of Principal Articles
and Grand Totals, 1888-92—continued.

(1686)

Articles.	Years.	United Kingdom.		Germany.		France.		Total all Countries.	
		Pounds.	Tons.	Pounds.	Tons.	Pounds.	Tons.	Pounds.	Tons.
Cotton yarns ..	1888	65,000	1,048	67,000	1,081	2,000	32	141,000	2,274
	1889	75,000	1,210	42,000	677	1,000	16	119,000	1,919
	1891	51,000	823	33,000	532	2,000	32	93,000	1,500
	1892	35,600	565	18,000	290	4,000	65	70,000	1,129
Sewing cotton..	1888	107,000	1,726	23,000	371	1,000	16	137,000	2,210
	1889	92,000	1,484	18,000	290	1,000	16	109,000	1,758
	1891	51,000	823	8,000	129	..	..	61,000	984
	1892	30,000	484	4,000	65	..	..	50,000	806
Leather ..	1888	83,000	1,339	377,000	6,081	41,000	661	589,000	9,500
	1889	77,000	1,242	432,000	6,806	20,000	328	828,000	13,355
	1891	46,000	742	273,000	4,403	16,000	258	734,000	12,161
	1892	34,000	548	180,000	2,903	28,000	452	516,000	8,323
Tallow..	1888	91,000	1,468	18,000	290	..	..	193,000	3,063
	1889	135,000	2,177	14,000	226	..	..	144,000	2,323
	1891	172,000	2,774	17,000	274	..	..	220,000	3,548
	1892	244,000	3,935	43,000	694	..	..	281,000	4,726
								324,000	5,226

IMPORTATIONS INTO RUSSIA FROM UNITED KINGDOM, GERMANY, AND FRANCE, SHOWING TOTALS OF PRINCIPAL ARTICLES
and Grand Totals, 1888-92—continued.

Articles.	Years.	United Kingdom.		Germany.		France.		Total all Countries.	
		Pounds.	Tons.	Pounds.	Tons.	Pounds.	Tons.	Pounds.	Tons.
Manures.	1888	..	27,919	211,000	3,403	..	..	1,856,000	29,935
	1889	1,731,000	31,559	312,000	5,031	..	..	2,135,000	34,145
	1890	1,930,000	..	..	..	..	..	2,052,000	43,210
	1891	1,165,000	18,790	204,000	3,290	..	..	1,956,000	31,226
	1892	1,558,000	25,129	186,000	3,000	..	..	2,579,000	41,597
Wool in raw state.	1888	93,000	1,500	186,000	3,000	..	..	348,000	5,613
	1889	63,000	1,016	136,000	2,177	..	..	359,000	5,790
	1890	60,000	968	79,000	1,274	2,000	32	286,000	4,613
	1891	58,000	925	112,000	1,806	2,000	32	272,000	4,409
	1892	44,000	661	141,000	2,274	20,000	322	263,000	4,242
Cement.	1888	..	..	..	..	..	..	907,000	14,529
	1889	271,000	4,319	441,000	7,161	110,000	1,774	939,000	15,009
	1890	364,000	5,710	457,000	7,371	247,000	3,984	1,506,000	19,355
	1891	196,000	3,177	359,000	5,823	288,000	4,595	1,657,000	17,048
	1892	351,051	5,661	1,525,000	24,597	210,000	3,387	2,556,000	41,225
Coal.	1888	84,835,000	1,369,906	10,580,000	170,645	..	..	96,526,000	1,557,839
	1889	102,590,000	1,643,839	10,188,000	164,194	12,600	194	114,927,000	1,838,661
	1890	84,522,000	1,383,274	8,608,000	140,280	..	..	94,340,000	1,521,613
	1891	86,170,000	1,373,700	8,928,000	129,484	6,000	97	94,200,000	1,519,355
	1892	80,250,000	1,291,500	6,840,000	110,468	73,000	1,177	87,227,000	1,410,903

RUSSIA.

IMPORTATIONS into Russia from United Kingdom, Germany, and France, showing Totals of Principal Articles
and Grand Totals, 1888-92—continued.

ST PETERSBURG.

Articles.	Years.	United Kingdom.		Germany.		France.		Total all Countries.	
		Pounds.	Tons.	Pounds.	Tons.	Pounds.	Tons.	Pounds.	Tons.
Coke	1888	3,638,000	58,677	4,790,000	77,358	..	..	9,800,000	153,065
	1889	5,141,000	82,919	4,660,000	75,161	..	..	12,038,000	194,161
	1890	3,063,000	49,403	6,045,000	97,600	..	..	12,292,000	198,253
	1891	3,183,000	51,339	5,805,000	93,629	..	..	12,398,000	199,968
	1892	2,609,000	42,081	7,089,000	114,342	..	..	14,048,000	226,586
Iron, pig, puddled, bars, and plates, of all dimensions ..	1888	973,000	15,694	1,668,000	26,903	..	..	3,596,000	58,000
	1889	5,636,000	90,903	3,680,000	59,354	4,000	65	11,280,000	181,985
	1890	6,289,000	101,435	3,682,000	59,387	9,000	145	12,737,000	206,242
	1891	4,027,000	63,177	2,599,000	41,919	26,000	419	8,003,000	123,086
	1892	4,660,000	75,161	2,253,000	36,339	44,000	710	7,277,000	117,871
Steel, pig, bars, and plates	1888	..	..	..	..	..	..	583,000	9,403
	1889	275,000	4,435	477,000	7,694	9,000	145	961,000	15,339
	1890	220,000	3,548	284,000	4,581	1,000	16	950,000	15,323
	1891	443,000	7,145	227,000	3,661	3,000	48	869,000	13,855
	1892	457,000	7,371	320,000	5,161	9,000	145	970,000	15,648
Tin in slabs, bars, and fragments ..	1888	..	..	..	..	..	..	141,000	2,274
	1889	91,000	1,468	15,000	242	1,000	16	132,000	2,129
	1890	93,000	1,500	17,000	274	14,000	226	159,000	2,565
	1891	83,000	1,339	12,000	194	15,000	242	134,000	2,161
	1892	110,000	1,774	16,000	255	18,000	290	177,000	2,854

IMPORTATIONS into Russia from United Kingdom, Germany, and France, showing Totals of Principal Articles
and Grand Totals, 1888-92—continued.

Articles.	Years.	United Kingdom.		Germany.		France.		Total all Countries.	
		Pounds.	Tons.	Pounds.	Tons.	Pounds.	Tons.	Pounds.	Tons.
Lead in pipes, fragments, rolls, plates, and pipes	1888	135,000	2,177	476,000	7,677	..	..	1,210,000	19,516
	1889	673,000	10,855	311,000	5,016	148,000	2,387	1,212,000	19,548
	1890	802,000	13,003	256,000	4,129	308,000	1,742	1,315,000	21,210
	1891	676,000	10,903	263,000	3,274	172,000	2,774	1,173,000	18,919
	1892	974,000	15,709	317,000	5,113	156,000	2,516	1,638,000	26,419
Total of metals unworked	1888	..	..	..	..	..	..	11,036,000	178,000
	1889	..	..	..	..	..	..	14,142,000	228,087
	1890	..	..	..	..	..	..	15,854,000	267,323
	1891	..	..	..	..	..	..	16,780,000	176,871
	1892	..	..	..	..	..	..	13,156,000	212,194
India rubber, gum-elastic in unworked liquid, and also all sorts of albumen	1888	111,000	1,760	65,000	1,048	..	..	208,000	3,355
	1889	99,000	1,597	72,000	1,161	3,000	48	233,000	3,753
	1890	136,000	2,194	57,000	919	2,000	32	217,000	3,500
	1891	163,000	2,629	59,000	952	4,000	64	234,000	3,774
	1892	..	..	..	..	5,000	81	270,000	4,355
Resin	1888	188,000	3,032	130,000	2,097	..	..	1,860,000	21,935
	1889	225,000	4,803	179,000	2,887	66,000	1,065	1,842,000	21,645
	1890	144,000	2,387	190,000	3,210	40,000	790	1,216,000	21,129
	1891	104,000	1,677	82,000	1,323	131,000	2,113	1,617,000	26,565
	1892	..	..	..	..	176,000	2,839	865,000	13,962

RUSSIA.

ST. PETERSBURG.

IMPORTATIONS into Russia from United Kingdom, Germany, and France, showing Totals of Principal Articles and Grand Totals, 1888-92—continued.

Articles.	Years.	United Kingdom.		Germany.		France.		Total all Countries.	
		Pounds.	Tons.	Pounds.	Tons.	Pounds.	Tons.	Pounds.	Tons.
Raw cotton ..	1888	1,602,000	25,839	920,000	14,839	1,000	16	10,079,000	162,565
	1889	697,000	11,242	713,000	11,500	166,000	2,677	8,558,000	138,082
	1890	656,000	10,586	676,000	10,903	43,000	694	7,632,000	123,097
	1891	1,948,000	31,419	774,000	12,484	28,000	371	10,148,000	163,677
	1892								
Jute ..	1888	497,000	8,016	38,000	616	13,000	210	598,000	9,645
	1889	327,000	5,274	..	..	12,000	184	454,000	7,323
	1890	381,000	6,145	150,000	2,419	16,000	259	689,000	10,306
	1891	261,000	4,210	14,000	226	1,000	16	346,000	5,586
	1892								
Machinery, and machinery appliances	1888	1,278,000	20,613	1,063,000	17,145	26,000	419	2,726,000	43,968
	1889	1,060,000	17,097	1,066,000	17,194	44,000	710	2,484,000	40,065
	1890	1,251,000	20,177	959,000	15,468	66,000	1,065	2,543,000	41,016
	1891	1,171,000	18,887	1,170,000	18,880	69,000	1,113	2,560,000	41,290
	1892								
Total imports*	1888	Roubles, 96,005,000	£ 9,600,500	Roubles, 122,293,000	£ 12,229,300	Roubles, 13,212,000	£ 1,321,200	Roubles, 323,293,000	£ 32,329,300
	1889	95,877,000	9,587,700	124,082,000	12,408,200	18,420,000	1,842,000	373,481,000	37,368,100
	1890	97,225,000	9,722,500	127,594,000	12,759,400	16,167,000	1,616,700	361,398,000	36,139,800
	1891	76,655,000	7,665,500	103,074,000	10,307,400	15,792,000	1,579,200	326,818,000	32,681,800
	1892	94,976,000	9,497,600	101,476,000	10,147,600	17,486,000	1,748,600	347,039,000	34,703,900

* Importations by Black Sea frontier of Caucasus not included.

Table B.—EXPORTATIONS from Russia to the United Kingdom, Germany, and France, showing Totals of Principal Articles and Grand Totals, 1888-92 (Finland not included).

Articles.	Years.	United Kingdom.			Germany.			France.			Total all Countries.		
		Pounds.	Tons.	Pounds.	Pounds.	Tons.	Pounds.	Pounds.	Tons.	Pounds.	Tons.		
Wheat...	1888	110,017,000	1,774,468	17,855,000	279,919	425,145	26,359,000	214,141,000	3,453,827	190,494,000	3,453,827		
	1889	93,514,000	1,508,806	14,110,000	227,351	296,710	18,366,000	190,494,000	3,072,434	181,895,000	3,072,434		
	1890	66,554,000	1,067,323	10,715,000	17,823	414,007	25,674,000	176,257,000	2,933,493	151,895,000	2,933,493		
	1891	46,795,000	744,758	17,935,000	259,210	416,581	25,158,000	176,257,000	2,842,332	141,603,000	2,842,332		
	1892	21,513,000	346,981	3,265,000	52,516	218,290	13,504,000	87,092,000	1,404,716	87,092,000	1,404,716		
Rye ..	1888	30,707,000	495,274	23,924,000	384,258	21,007	1,494,000	166,139,000	1,712,242	89,330,000	1,712,242		
	1889	27,331,000	436,803	17,298,000	277,548	17,855	1,197,000	79,489,000	1,343,881	79,489,000	1,343,881		
	1890	27,610,000	443,223	15,800,000	255,903	6,309	829,000	66,821,000	1,077,753	66,821,000	1,077,753		
	1891	16,792,000	263,774	21,694,000	349,903	2,677	166,000	11,048,000	178,194	11,048,000	178,194		
	1892	1,318,000	17,932	2,647,000	42,698	500	31,000						
Barley ..	1888	41,956,000	722,481	9,695,000	155,419	40,855	3,001,000	79,888,000	1,008,516	79,888,000	1,008,516		
	1889	30,891,000	513,226	9,866,000	159,129	25,097	1,556,000	65,611,000	1,008,516	65,611,000	1,008,516		
	1890	27,892,000	448,919	8,562,000	126,384	4,097	2,640,000	69,552,000	976,601	69,552,000	976,601		
	1891	19,819,000	313,601	7,574,000	126,384	8,210	569,000	45,812,000	739,016	45,812,000	739,016		
	1892	17,551,000	280,081	6,384,000	102,008	15,371	953,000	43,571,000	509,636	43,571,000	509,636		
Oats ..	1888	47,837,000	771,504	8,675,000	139,995	176,493	10,997,000	87,840,000	1,417,581	87,840,000	1,417,581		
	1889	39,007,000	634,165	19,418,000	148,052	73,839	4,378,000	69,552,000	1,122,742	69,552,000	1,122,742		
	1890	28,777,000	464,457	6,865,000	110,719	30,419	1,886,000	51,643,000	831,593	51,643,000	831,593		
	1891	28,777,000	464,457	4,776,000	77,002	24,391	1,097,000	43,571,000	737,221	43,571,000	737,221		
	1892	16,972,000	273,742	639,000	16,906	1,097	68,000	29,296,000	356,855	29,296,000	356,855		

RUSSIA.

EXPORTATIONS from Russia to the United Kingdom, Germany, and France, showing Totals of Principal Articles and Grand Totals, 1888-92 (Finland not included)—continued.

Articles.	Years.	United Kingdom.		Germany.		France.		Total all Countries.	
		Pounds.	Tons.	Pounds.	Tons.	Pounds.	Tons.	Pounds.	Tons.
Total of all other kinds except above	1888	16,011,000	258,242	13,237,000	213,500	3,521,000	56,790	51,834,000	836,032
	1889	14,394,000	232,161	16,666,000	267,177	4,467,000	72,048	51,536,000	831,226
	1890	9,484,000	152,968	15,123,000	243,919	2,443,000	39,403	43,842,000	699,065
	1891	10,984,000	177,161	15,663,000	252,629	1,899,000	22,565	51,544,000	831,355
	1892	8,102,000	130,677	7,933,000	127,952	464,000	7,484	33,539,000	540,952
Total of the whole	1888	249,422,000	4,023,082	72,728,000	1,173,032	45,402,000	732,290	539,912,000	8,708,252
	1889	209,632,000	3,381,161	68,167,000	1,093,468	30,104,000	485,548	460,819,000	7,432,565
	1890	156,988,000	2,532,065	56,620,000	913,226	30,586,000	498,323	413,417,000	6,668,016
	1891	123,100,000	1,985,483	67,937,000	1,095,758	29,031,000	488,243	386,136,000	6,228,000
	1892	65,267,000	1,052,532	20,859,000	336,435	15,050,000	242,742	195,204,000	3,148,452
Oil seeds	1888	14,777,000	238,339	2,435,000	39,274	511,000	8,242	28,286,000	455,419
	1889	15,416,000	248,645	5,173,000	83,435	1,483,000	23,919	31,470,000	507,581
	1890	12,272,000	197,935	5,904,000	95,226	1,669,000	26,919	38,530,000	540,806
	1891	9,668,000	156,985	6,001,000	96,790	1,664,000	26,839	25,479,000	410,952
	1892	5,490,000	88,546	4,158,000	67,064	985,000	15,081	16,769,000	270,467
Flax	1888	4,103,000	66,177	4,769,000	76,919	1,625,000	26,210	11,829,000	190,790
	1889	4,113,000	66,389	4,141,000	66,740	1,106,000	17,839	11,210,000	186,806
	1890	3,953,000	63,855	4,241,000	68,403	2,068,000	33,355	12,096,000	195,097
	1891	3,763,000	60,693	4,068,000	65,613	1,804,000	29,097	11,309,000	182,403
	1892	3,686,000	59,452	3,722,000	60,032	2,323,000	37,565	12,626,000	193,963

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EXPORTATIONS from Russia to the United Kingdom, Germany, and France, showing Totals of Principal Articles
and Grand Totals, 1888-92 (Finland not included) — continued.

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RUSSIA.

Articles.	Years.	United Kingdom.		Germany.		France.		Total all Countries.	
		Pounds.	Tons.	Pounds.	Tons.	Pounds.	Tons.	Pounds.	Tons.
Hemp ..	1888	547,000	8,823	2,361,000	38,081	..	..	3,296,000	53,161
	1889	688,000	11,097	2,697,000	43,034	..	..	4,014,000	65,226
	1890	622,000	10,194	2,382,000	38,419	58,000	935	3,282,000	52,335
	1891	456,000	7,516	2,557,000	41,403	117,000	1,897	3,395,000	54,758
	1892	407,000	6,565	2,392,000	37,129	60,000	968	2,992,000	48,003
Bristles ..	1888	14,000	226	129,000	2,081	..	..	164,000	2,545
	1889	26,000	419	118,000	1,903	4,000	65	168,000	2,710
	1890	29,000	371	111,000	1,760	2,000	32	156,000	2,513
	1891	31,000	500	105,000	1,683	4,000	65	161,000	2,537
	1892	26,000	419	84,000	1,371	1,000	16	124,000	2,000
Tallow ..	1888	16,000	258	42,000	677	..	..	188,000	3,032
	1889	22,000	355	54,000	871	..	..	228,000	3,677
	1890	19,000	306	32,000	516	..	..	238,000	3,839
	1891	15,000	242	30,000	484	..	..	205,000	3,323
	1892	15,000	242	17,900	274	..	..	141,000	2,271
Wood ..	1888	825,000	13,306	171,000	2,758	..	..	1,426,000	23,000
	1889	1,134,000	17,896	256,000	4,081	314,000	5,048	2,044,000	32,368
	1890	1,027,000	16,566	196,000	3,081	292,000	4,568	1,716,000	28,322
	1891	1,002,000	16,134	228,000	3,677	155,000	2,500	1,786,000	28,806
	1892	738,000	11,903	114,000	2,023	166,000	2,677	1,238,000	19,868

EXPORTATIONS from Russia to the United Kingdom, Germany, and France, showing Totals of Principal Articles
and Grand Totals, 1888-92 (Finland not included)—continued.

Articles.	Years.	United Kingdom.		Germany.		France.		Total all Countries.	
		Pounds.	Tons.	Pounds.	Tons.	Pounds.	Tons.	Pounds.	Tons.
Petroleum products	1888	6,840,000	110,323	3,657,000	53,984	1,014,000	16,355	33,843,000	545,855
	1889	7,649,000	123,371	4,029,000	64,984	1,271,000	20,500	44,236,000	718,484
	1890	9,122,000	147,129	3,123,000	50,371	1,557,000	25,113	47,488,000	765,935
	1891	7,322,000	118,097	2,828,000	45,613	1,092,000	17,613	53,579,000	884,177
	1892	6,788,000	109,486	3,953,000	68,758	2,038,000	33,677	55,855,000	900,887
Ropes ..	1888	43,000	694	60,000	968	..	..	191,000	3,081
	1889	31,000	500	69,000	1,113	..	..	151,000	2,435
	1890	26,000	419	53,000	855	1,000	16	141,000	2,274
	1891	40,000	645	58,000	935	..	..	174,000	2,806
	1892	29,000	468	30,000	484	..	..	74,000	1,193
Manganese ore	1888	1,628,000	26,253	250,000	4,032	277,000	4,468	3,056,000	49,290
	1889	2,348,000	37,871	303,000	4,837	122,000	1,968	3,236,000	52,194
	1890	5,275,000	85,081	439,000	7,031	511,000	8,242	8,235,000	132,823
	1891	2,487,000	40,113	261,000	4,210	51,000	823	4,574,000	73,774
	1892	3,677,000	59,306	332,000	5,355	64,000	1,032	7,876,000	127,032
Spirit ..	1888	664,000	1,792,800	342,737,000	925,389,900	Degrees.	Gallons.	Degrees.	Gallons.
	1889	13,511,000	36,479,700	254,426,000	686,150,200	15,353,000	41,453,100	533,509,000	1,440,474,300
	1890	27,613,000	74,555,100	251,143,000	678,086,100	7,941,000	21,440,700	4,020,890,000	1,085,640,300
	1891	21,718,000	53,638,400	270,374,000	730,009,500	1,063,000	2,870,100	425,697,000	1,149,381,900
	1892	5,273,000	14,237,100	49,574,000	133,849,800	9,787,000	26,424,900	40,960,000	1,087,020,000
						2,213,000	6,375,100	96,000,000	256,500,000

EXPORTATIONS from Russia to the United Kingdom, Germany, and France, showing Totals of Principal Articles and Grand Totals, 1888-92 (Finland not included)—continued.

Articles.	Years.	United Kingdom.			Germany.			France.			Total all Countries.	
		Pounds.	Tons.	Pounds.	Pounds.	Tons.	Pounds.	Pounds.	Tons.	Roubles.	Roubles.	£
Timber	1888	52,224,000	858,452	45,654,000	726,677	138,919	8,903,000	6,127,040	99,306	39,961,000	3,896,100	
	1889	61,912,000	993,742	69,235,000	1,113,742	99,306	6,127,040	3,428,181	342,818	55,735,686	5,573,370	
	1890	17,683,810	1,768,381	24,869,359	2,486,936	214,5	3,428,181	131,000	2,145	53,698,395	5,369,839	
	1891	224,000	3,774	49,000	722	2,145	131,000	4,293,252	426,223	..	..	
	1892	16,487,946	1,546,784	16,915,544	1,681,554	426,223	4,293,252	23,000	371	47,494,856	4,369,439	
	1893	112,000	1,555	60,000	968	371	23,000	2,512,349	251,934	..	..	
	1894	15,678,197	1,569,819	23,176,869	2,317,686	251,934	2,512,349	30,000	484	48,978,000	4,397,500	
	1895	49,000	790	67,000	1,081	484	30,000	..	..	..	..	
	1896	27,558,000	27,558,000	181,551,000	18,155,100	5,281,300	52,812,000	35,239,000	3,523,000	738,297,000	75,829,760	
	1897	25,607,000	25,607,000	190,338,000	19,033,800	3,523,000	35,239,000	41,835,000	4,182,500	734,336,000	73,443,000	
All kinds of produce and manufactures	1898	191,918,000	19,191,800	176,481,000	17,648,100	4,394,300	43,943,000	29,412,000	2,941,200	870,115,000	87,011,500	
	1899	172,605,000	17,260,500	191,527,000	19,152,700	4,394,300	43,943,000	29,412,000	2,941,200	884,075,000	88,407,500	
	1900	109,279,000	10,927,900	136,261,000	13,626,100	2,941,200	29,412,000	..	..	449,514,000	44,951,400	
	1901	..	..	..	..	..	..	..	..	..	..	

* Not including trade by the Black Sea frontier of the Caucasus.

+ Exchange taken at the approximate average of 10 roubles = 1 £.

RUSSIA.

Table C.—IMPORTS of Various Articles into Russia from the United Kingdom, Germany, and France in 1891-92.
(Articles affected by Russo-Franco Convention of 1893.)

(1686)

Tariff of 1891.	Classification.	United Kingdom.		Germany.		France.		Total from all Countries.	
		1891.	1892.	1891.	1892.	1891.	1892.	1891.	1892.
13	Various condiments such as:—Prepared mustard, soy, pickles, capers, green and black olives, vegetables, fruit and other edibles of all kind in oil, vinegar, or otherwise prepared (pressed), imported in glass, jars, earthenware, tin, or other vessels hermetically closed, not specially named... .. Tons ...	71	50	59	67	49	34	244	205
	REMARK.—Capers, green and black olives, cucumbers, and other vegetables prepared in vinegar, and imported in tins and kinds of packing; meat extracts, are taxed according to this article.								
24	Confectionery products, not specially named— 1. Bon-bons, jam, sugar, syrups, with improving mixtures; fruit and berry syrups; fruit pastes (pastila), jelly, fruit pastes and confectionery with sugar; fruit with rum, with liqueur, with cognac, with syrup and liqueur, concentrated milk and other alimentary substances with sugar; chocolate, with or without sugar; cacao, ground with sugar " ...	10.1	6	49	55	42	24	78	98
27	Arack, rum, French brandies (of raisin), liqueur of plums, kirsch, gin, whisky; grain, spirit, and grain wine without improving admixtures— 1. Imported in casks and barrels 2. Liqueurs and spirit infusions with or without sugar Bottles ...	26 23,692	73 30,012	98 84,499	72 53,273	333 200,301	372 211,453	500 353,209	590 334,319
28	Wine of grapes and berries— 2. Non-sparkling 3. Sparkling, all kinds	9,600 8,276	8,905 13,595	68,238 62,083	44,331 22,362	73,479 343,549	87,728 221,051	176,776 484,694	142,274 472,767
32	Mineral waters, natural or artificial	13,390	16,295	1,103,319	967,392	168,965	222,837	2,140,815	2,139,023
35	Cheese Tons ...	24	9	424	282	86	61	669	621
	REMARK.—Cheese, imported in lead or tin wrappings, is taxed together with the weights of these wrappings.								

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IMPORTS OF Various Articles into Russia from the United Kingdom, Germany, and France in 1891-92—continued.
(Articles affected by Russo-Franco Convention of 1893.)

(1686)

Tariff of 1891.	Classification.	United Kingdom.		Germany.		France.		Total from all Countries.	
		1891.	1892.	1891.	1892.	1891.	1892.	1891.	1892.
65	REMARK 1.—The duty fixed in the present article is applicable to all kinds of goods in felt, flax, or hemp, paper maché, paste-board and other non-metallic compositions, as well as to articles in stamped wood, or in alabaster arranged as relief on wood, when such articles are made to imitate carved or turned wood. REMARK 2.—Frames with fixed looking glasses, having more than 153 square inches a piece, also with pictures imported duty free, if the latter cannot be taken out pay a duty of 30 c., gold, per arshine (28 inches), long measure, the fractions of an arshine being counted for a whole arshine. In all other cases articles imported in fixed frames are taxed, together with the weight of these frames. Building materials— 4. Hydraulic substances used for building: all kinds of cement (Portland, artificial, or natural, Roman, mixed, scoria, and others); all hydraulic supplementary substances (including puzzolan trass, sanctorin earth, scoria in crystallised powder); hydraulic lime; gypsum, ground, not burnt; burnt gypsum (alabaster), bricks, paving stones, and pipes of cement ...	...	...	...	...	...	...	...	...
75	Earthenware— 2. With single coloured designs, borders and edges; china works not painted in a mass ...	39,558	32,460	32,012	41,512	11,810	5,868	119,264	115,847
76	Porcelain— 1. Porcelain (not specially named), white and single coloured, even with coloured or gilt edges and borders, but without other ornaments; all kinds of majolica even with saucio work	66	53	90	53	13	7	229	160
112	Chemical and pharmaceutical products not specially named ... REMARK.—Carbonic acid in liquid state and other spirits in liquid state, imported in metallic bottles, are subjected to duty, according to Article 112; 80 per cent. of the total weight is taxed according to the material of the bottles.	5	3	51	51	14	7	75	75
		698	789	2,016	2,648	68	101	2,960	3,765

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IMPORTS of Various Articles into Russia from the United Kingdom, Germany, and France in 1891-92—continued. (Articles affected by Russo-Franco Convention of 1893.)

(1686)

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Tariff 1891.	Classification.	United Kingdom.		Germany.		France.		Total from all Countries.	
		1891.	1892.	1891.	1892.	1891.	1892.	1891.	1892.
150	2. Articles with ornaments in relief or engraving (except stamped ones), trimmed and untrimmed, covered or not covered with verdigris, mounted or not mounted Cast iron, worked— 1. Iron castings, in the rough 2. Cast iron articles cleaned, polished, filed, painted, bronzed, tinned, covered with polish, enamel (except enamels), zinc, or with other common materials, even with parts of wood, copper, and its alloys REMARK.—Sec. 3 of this Article is applicable to all rough goods of malleable cast-iron, as well as such cleaned goods the weight being more than 5 lb. a piece; cleaned goods of malleable cast-iron, not more than 5 lb. a piece, are taxed, according to Sec. 2 of Article 153.	105	303	449	553	3	3	798	908
153	Iron and steel ware, not specially named, cleaned, polished, filed, bronzed, or otherwise manufactured with parts of wood, copper, and its alloys, excepted from them— 1. More than 5 lb. in the piece 2. Less than 5 lb. in the piece Wire works— 1. Of iron and steel— a. All kinds, not specially named b. Cards of all kinds 2. Of copper and copper alloys— a. All kinds, not specially named b. Wire meshes, containing in the length of an inch 24 threads and more; wire covered with fibrous materials or indiarubber 3. Wire nails, shoemaker's nails, horse shoe nails, cast-iron nails, rivets, pins, and piano pegs REMARK.—Wire covered with silk, even mixed with other textile materials, pays an increase of 20 per cent. above the duty fixed in Sec. 2, 4, of the present Article.	513	386	504	526	28	27	1,588	1,114
156	1. More than 5 lb. in the piece 2. Less than 5 lb. in the piece Wire works— 1. Of iron and steel— a. All kinds, not specially named b. Cards of all kinds 2. Of copper and copper alloys— a. All kinds, not specially named b. Wire meshes, containing in the length of an inch 24 threads and more; wire covered with fibrous materials or indiarubber 3. Wire nails, shoemaker's nails, horse shoe nails, cast-iron nails, rivets, pins, and piano pegs REMARK.—Wire covered with silk, even mixed with other textile materials, pays an increase of 20 per cent. above the duty fixed in Sec. 2, 4, of the present Article.	1,258	1,723	1,112	983	135	231	2,974	3,476
		222	171	449	372	41	31	799	654
		268	235	1,491	535	56	64	1,989	934

IMPORTS of Various Articles into Russia from the United Kingdom, Germany, and France in 1891-92—continued.
(Articles affected by Russo-Franco Convention of 1893.)

(1686)

Tariff of 1891.	Classification.	United Kingdom.		Germany.		France.		Total from all Countries.	
		1891.	1892.	1891.	1892.	1891.	1892.	1891.	1892.
172	REMARK 2.—Supplementary parts of electric elements, batteries, and other apparatus imported separately, which get wasted through use, and require replacing, such as: zinc, copper, and other plates, with carbons for elementary batteries, as also for lamps and lanterns. Musical instruments— 1. Grand pianos, all kinds of non portable organs } Pieces ... 2. Cottage pianos } 3. All kinds of musical instruments not specially named; accessories of musical instruments imported separately, such as: riddle bows, sheep and silk strings (metal strings are subjected to Article 165), key-boards, hammers (the pegs are subjected to Article 166, Sec. 3), metronomes, tuning forks, &c. } Cwts. . . REMARK.—Musical instruments are taxed together with the weight of the boxes and cases to which they belong.	9	17	696	375	37	42	811	474
177	Stationery— 6. Paper for writing, for typography, lithography, binding, and confectionery, with ornaments, such as: with gilding, silvering, brozzina, pressing, cutting (lace), with patterns, designs, borders, arms, initials, pictures, &c., paper for cigarettes, thin sheets of paper (Chinese paper), coloured paper not painted in one mass (covered with white or other thin sides, paper articles, envelopes), lamp shades, artificial flowers of paper, &c. } Tons ... Woven and knitted stuffs not specially named of wool and goat-hair plain, woven in colours, with or without cotton— a. All kinds except those named in Sec. b } b. Materials of combed wool or mixed with such material }	26.76	28.104	2,508.72	2,371.92	68.100	74.28	2,998.80	2,799
199	Woven and knitted stuffs not specially named of wool and goat-hair plain, woven in colours, with or without cotton—	45	36	164	129	76	120	399	329
B 4	a. All kinds except those named in Sec. b }	41	29	211	99	37	40	302	191
	b. Materials of combed wool or mixed with such material }								

Imports of Various Articles into Russia from the United Kingdom, Germany, and France in 1891-92—continued.

(Articles affected by Russo-Franco Convention of 1893.)

Tariff No.	Classification.	United Kingdom.		Germany.		France.		Total from all Countries.	
		1891.	1892.	1891.	1892.	1891.	1892.	1891.	1892.
		Tons		Tons		Tons		Tons	
206	Knitted work and braids— 1. Knitted articles even with marks of sewing— a. Of silk b. Of half-silk c. Of all other kinds 2. Cords and braids—ornamentation, fringe, tassels, trimmings, and other piece goods— a. Silk and half silk b. All other kinds	28	7	150	30	13	4	206	43
	REMARK.—The articles named in Secs. 1 ^a and 2 ^a , and containing a mixture of silk and taxed in the same manner, are taxed with 20 per cent. above the duty fixed in these paragraphs.								
207	Lace, embroidery, insertion— 1. All sorts of lace done by hand, silk lace done by machine, silk embroidery and insertion...	2,100	6-12	108	132-64	49-92	94-60	301-8	231
209	Linen and clothes finished or half finished— 1. Linen hats and all other kinds of head wear, with trim- mings of ribbons, fluffs, feathers, &c. ... REMARK 1.—Hats, dresses and coats of fur, worn but not covered with cloth, are taxed according to the fur of which they are made, unless they are made of cloth, in which case they are taxed as cloth, with an increase of 20 per cent. For dresses and coats covered with stuff, and fur caps are taxed according to Secs. 3, 4, 5, and 6 of this Article. REMARK 2.—Horse-dresses, counterpanes, curtains, blinds, and other article articles trimmed, but without any other trimming, are taxed according to the chief material of which they are made, the same amount being added as is taxed according to the material of which they are made, with an increase of 20 per cent. on the duty for such material.	...	...	3-96	2-28	1-73	1-68	5-62	3-96

IMPORTS of Various Articles into Russia from the United Kingdom, Germany, and France in 1891-92—continued.
(Articles affected by Russo-Franco Convention of 1893.)

Tariff of 1891.	Classification.	United Kingdom.				Germany.		France.		Total from all Countries.	
		1891.		1892.		1891.		1891.		1891.	
		1891.		1892.		1891.		1891.		1891.	
210	Hats— 1. Of felt, half felt, castor, and all kinds of stuffs, in finished or prepared state REMARK 1.—Ladies' hats with trimming, that is, with ribbons, feathers, flowers, lace, and other materials that serve for trimming hats, are taxed according to Sec. 7 of Article 209 (linen and clothes), the shapes for ladies' hats made of transparent starched tissue, with framework, are taxed according to Article 210, Sec. 1. REMARK 2.—Caps with fur edges and fur hats are taxed according to Remark 1 in Article 209 (linen and clothes).	Tons		...		...		...		...	
		75	53	149	104	37	41	408	331		
213	Trimmed feathers of ostrich, marabout, birds of paradise, and others; plumage and feather trimmings for clothes; artificial flowers, except those of china, earthenware, paper, and leather; artificial decorating plants with admixture of valuable materials ... REMARK 1.—Feathers and skins with feathers of valuable birds, or of common birds trimmed with feathers imitating valuable feathers, in raw state, untrimmed, as well as separate parts of artificial flowers pay a duty of 4 r. gold per lb. REMARK 2.—Artificial decorating plants with and without flowers, without admixture of valuable materials pay a duty of 2 r. gold per lb.	Cwts.		...		...		...		...	
		...	0.36	57.24	35.73	23.16	20.28	86.16	63		
215	Tinkets and toilet articles not specially named, whole and in parts; children's playthings— 1. Valuable articles which contain silk, aluminium, mother-of-pearl, corals, tortoise shell, ivory, enamel, amber, and similar valuable materials, gilt or silvered metals, and metallic compositions; all kinds of articles in mother-of-pearl, tortoise-shell, ivory, and amber not specially named	"		"		"		"		"	
		11.100	21.60	286.28	260.76	92.28	123.48	412.8	486.36		

Table D.—EXPORTATIONS from European Russia from January 1 to December 1, 1892 and 1893.

Articles.		Quantity.	
		1892.	1893.
Wheat	Tons	1,190,226	2,299,419
Rye	"	179,774	1,618,645
Barley	"	666,661	1,612,645
Oats	"	300,887	778,581
Other kinds of grain and flour	"	556,484	679,065
Oil seeds	"	240,726	280,903
Flax	"	166,451	151,290
Hemp	"	44,629	39,581
Bristles	"	1,931	1,742
Tallow	"	2,048	2,645
Wool	"	87,258	10,339
Manganese ore	"	110,403	113,790
Naphtha	"	799,581	883,306
Ropes	"	3,242	2,194
Spirit	Gallons	240,000,000	493,300,000

Table E.—IMPORTATIONS into European Russia from January 1 to December 1, 1892 and 1893.

Articles.	Quantity.	
	1892.	1893.
	Tons	Tons.
Salt	9,468	6,468
Herrings	98,855	118,597
Coffee	5,935	6,597
Tea	10,581	13,194
Cotton yarns	1,032	1,113
Sewing cotton	645	839
Leather	8,582	12,824
Tallow	5,355	4,887
Manures, phosphates, &c... ..	38,629	43,145
Wool	4,097	11,161
Cement and hydraulic substances	40,613	58,548
Coal	1,385,048	1,628,790
Coke	211,290	270,161
Iron	127,432	232,119
Steel	15,210	32,906
Tin	2,694	3,532
Lead	24,645	27,500
Total of metals unworked	210,758	346,016
Indiarubber and indiarubber goods	113	129
Resin	13,645	19,532
Cotton, raw	137,113	104,500
Jute, raw	4,984	13,016
Machines and machinery appliances	40,758	52,952

Table F.—VALUE of Exports from January 1 to December 1, 1892 and 1893.

1892.	1893.	Raw and Half-manufactured Materials.		Animals.		Manufactures.		Total.	
		1892.	1893.	1892.	1893.	1892.	1893.	1892.	1893.
£	£	£	£	£	£	£	£	£	£
18,359,000	30,095,600	21,010,400	20,149,500	1,406,800	1,211,500	2,329,800	2,274,800	43,106,800	53,731,400

Table G.—VALUE of Imports from January 1 to December 1, 1892 and 1893.

1892.	1893.	Raw and Half-manufactured Materials.		Animals.		Manufactures.		Total.	
		1892.	1893.	1892.	1893.	1892.	1893.	1892.	1893.
£	£	£	£	£	£	£	£	£	£
5,204,700	6,888,600	21,799,600	23,580,900	74,600	124,000	7,038,900	8,186,800	34,117,800	38,780,100

APPENDICES.

I.

“Journal de St. Pétersbourg,” June 25, 1893.

(a)

S. M. l'Empereur a approuvé le 11 juin l'avis suivant du conseil de l'Empire sur l'introduction d'un double tarif douanier :

I. Le tarif douanier général pour le commerce avec l'Europe approuvé par S. M. l'Empereur le 11 juin 1891, avec tous les changements qui y ont déjà été introduits et qui pourront y être introduits avec le temps, sera appliqué aux marchandises représentant les produits du sol et de l'industrie de ceux des pays qui admettent les produits russes aux conditions les plus favorables d'importation et de transit.

II. Le tarif indiqué dans l'art. I est appliqué comme suit aux marchandises qui sont le produit du sol et de l'industrie des pays qui n'accordent pas aux marchandises russes le plus de conditions avantageuses pour l'importation et le transit :

(1) avec une surtaxe de 30 pour cent—sur les articles : 4 ; 6 alinéa 2 ; 7 ; 9 ; 13 ; 14 ; 21 al. 2 et 3 ; 24 ; 27 ; 28 ; 35 ; 37 al. 2 et 3 ; 38 ; 43 al. 1 ; 46 ; 52 ; 57 ; 60 ; 61 al. 2, 3, 4, 5 et leurs observations ; 64 al. 2 et 3 et observ. ; 66 al. 4 lit. b. et 5 lit. b. ; 69 al. 3 ; 70 ; 71 al. 5 ; 74 al. 2 et 3 ; 75 ; 76 ; 77 ; 78 ; 88 al. 2, 3 et 4 et leurs observations ; 91 ; 95 ; 100 ; 101 ; 102 ; 105 ; 106 ; 107 ; 108 ; 109 ; 110 ; 111 ; 113 ; 115 ; 117 ; 119 ; 120 al. 1 ; 124 al. 3 ; 130 ; 133 ; 134 al. 2 ; 135 ; 148 ; 149 al. 2 et 3 ; 151 ; 152 ; 153 ; 154 ; 155 ; 156 ; 157 ; 158 ; 159 ; 161 ; 167 al. 1, 2, 3 et 5 et son observation ; 168 ; 169 ; 170 ; 171 ; 172 ; 173 ; 174 ; 175 ; 177 ; 183 ; 184 ; 185 ; 187 ; 188 ; 189 ; 190 ; 191 ; 192 ; 193 ; 194 ; 195 ; 196 ; 197 ; 198 ; 199 ; 200 ; 201 ; 203 ; 205 ; 206 ; 207 ; 208 ; 209 ; 210 ; 211 ; 212 ; 213 ; 214 ; 215 ; 216 et 220, avec son observation.

(2) avec une surtaxe de 20 pour cent—sur les articles : 2 al. 1 ; 5 pp. 2 et 3 ; 6 al. 1, 3 et 4 ; 10 ; 11 ; 12 ; 16 ; 17 ; 18 al. 2 ; 19 al. 2 ; 21 al. 1 ; 23 ; 25 ; 30 ; 31 ; 34 ; 36 ; 37 al. 1 lit. a ; 41 al. 2, 3 et 4 ; 42 ; 43 al. 2 ; 48 ; 50 ; 51 ; 54 ; 55 ; 56 al. 2 et 4 ; 58 al. 1 lit. b. et c, al. 2, 3 et 4 ; 59 ; 61 al. 1 ; 62 al. 4 ; 64 al. 1 ; 65 al. 1, 3 et 4 ; 66 al. 2, 3, 4 lit. a, 5 lit. a, et observ. et al. 6 et 7 ; 67 ; 68 ; 69 al. 1 et 2 ; 71 al. 2, 3 et 4 ; 72 al. 2 ; 73 ; 74 al. 1 ; 81 ; 82 ; 83 al. 2 et 3 ; 85 ; 86 ; 93 al. 2 ; 94 al. 2 ; 96 al. 2 et 3 ; 98 ; 99 ; 112 ; 116 ; 118 ; 120 al. 2 ; 121 ; 122 ; 123 ; 124 al. 2 ; 125 al. 1 et 2 ; 126 ; 127 ; 129 ; 131 ; 132 ; 134 al. 1 ; 136 ; 137 ; 140 ; 141 ; 142 ; 143 ; 144 ; 146 al. 2 et 3 ; 147 ; 149 al. 1 ; 150 ; 162 ; 163 ; 164 ; 165 ; 166 ; 167 al. 4 ; 176 p. 1 lit. b et al. 2 ; 180 ; 181 ; 182 ; 186 et 202.

(3) sans surtaxe—sur les articles et subdivisions des articles du tarif général qui ne sont pas énumérés dans les deux paragraphes (1 et 2) précédents.

III Le tarif général est appliqué avec une surtaxe de 15 pour cent aux marchandises ci-dessous de provenance extra-européenne quand elles sont importées d'un pays de l'Europe qui n'admet pas les produits russes aux conditions les plus favorables d'importation et de transit ; le riz ou le blé sarrazin brut (art. 2, al. 2), les épices (art. 15), le café non brûlé en grains (art. 18, al. 1), le cacao en grains et ses cosses non brûlés (art. 19, al. 1), la gomme, la gomme arabique, les résines et baumes de gomme (art. 87), l'indigo (art. 128), le coton en laine brut (art. 179 al. 1) et le jute brut (art. 179, al. 2).

IV. Les questions concernant l'application du tarif maximum (chapitres II et III) seront résolues dans l'ordre adopté pour l'application du tarif général (annexe à l'art. 816 du règlement douanier, "Recueil des lois," tome VI, suite de l'année 1886).

V. Le ministre des finances est autorisé, en cas de besoin, à porter à la connaissance générale par des publications les règlements obligatoires pour les propriétaires des marchandises importées et pour ceux qui les vendent à l'effet de fournir les preuves voulues sur la provenance des marchandises venant de pays qui admettent les produits russes aux conditions les plus favorables d'importation et de transit ; de même à l'effet de prouver que les marchandises énumérées dans le chapitre III proviennent de ces mêmes pays et y ont été importées directement de leurs pays de production, et enfin à l'effet de définir les droits et les devoirs des bureaux de douane quant à l'application de la présente loi.

VI. Il est arrêté, à titre de supplément aux lois existantes :

Dans le cas où, au détriment des recettes douanières, le pays de provenance ou le port d'embarquement des marchandises seraient faussement indiqués, le déclarant des marchandises est frappé d'une amende représentant cinq fois la différence entre les droits d'entrée des marchandises d'après le tarif général et le tarif maximum.

VII. Le ministre des finances est autorisé, d'accord avec le ministre des affaires étrangères, à demander, par la voie de rapports présentés à l'Empereur, la sanction de Sa Majesté Impériale pour la définition des pays qui n'admettent pas les produits russes aux conditions les plus favorables d'importation et de transit.—("Bulletin des Lois.")

(b)

Le "Journal du Ministère des Finances" publie dans son numéro d'aujourd'hui l'article suivant :—

Le "Bulletin des Lois" promulgue, en date de ce jour, le texte d'une nouvelle loi établissant en Russie un double tarif douanier.

Aux termes de cette loi, le tarif actuellement en vigueur, avec les changements qu'il pourrait subir ultérieurement, sera appliqué dorénavant aux produits des pays qui admettent les produits russes aux conditions les plus favorables d'importation et de transit, tandis que les produits des pays n'accordant pas à la Russie un

semblable traitement, seront frappés d'une surtaxe de 30, 20 et 15 pour cent (selon la catégorie des marchandises).

Le gouvernement impérial a, de longue date, maintenu le régime d'un tarif général unique, selon lequel les produits similaires étrangers étaient frappés des mêmes droits indépendamment de leur origine.

Ce régime réservant à l'Etat une liberté complète d'établir ses tarifs douaniers conformément aux besoins du commerce, de l'industrie et du Trésor, garantissait en même temps aux autres pays une parfaite égalité de traitement, n'imposant à aucun de ces pays des conditions d'importation moins favorables que celles accordées aux autres pays.

Sur cette base traditionnelle de sa politique douanière, la Russie n'a pas cessé de travailler à la protection de ses forces productives. Elle envisageait avec calme l'extension progressive des tendances protectionnistes à l'étranger, s'abstenant en même temps de toute tentative d'entrer dans des arrangements commerciaux qui auraient eu pour but de favoriser le commerce extérieur de certains pays au détriment de celui de certains autres.

En accordant une parfaite égalité de traitement à tous les produits similaires étrangers, la Russie était en droit d'espérer qu'à titre de réciprocité ses produits ne seraient traités dans aucun pays étranger, par rapport à l'importation, moins favorablement que les produits similaires de tout autre pays. Cela a été le cas jusqu'à une époque toute récente. La plupart des pays accordaient aux produits russes—en échange, de la part de la Russie, d'un traitement douanier uniforme pour toutes les provenances de l'étranger—les conditions d'importation les plus favorables, et s'il se trouvait, d'autre part, à titre d'exception, quelques réductions de droits dont la Russie ne bénéficiait pas, ces réductions n'étaient d'aucune valeur pour son commerce extérieur et ne visaient aucun des produits que la Russie exportait.

Cependant, à partir de 1892 un changement important se manifesta dans la direction de la politique douanière en Europe. Ce changement se porta spécialement sur l'extension du système des concessions mutuelles sur le terrain des tarifs douaniers; concessions étendues à un nombre d'articles beaucoup plus considérable que par le passé et spécialement aux droits sur les produits agricoles, dont l'exportation nous intéresse tout particulièrement. Ces concessions n'ayant pas été accordées à la Russie, son commerce extérieur se trouva, pour la première fois, placé, de fait, dans des conditions de concurrence défavorables vis-à-vis des produits similaires des autres pays, et cela au désavantage de notre exportation et à l'encontre du principe d'une réciprocité équitable, car la Russie continuait, comme par le passé, d'accorder aux pays défavorables à son importation le même traitement douanier qu'aux pays qui nous favorisaient le plus.

Dès lors, le maintien d'un tarif unique devenait impossible et le gouvernement impérial était amené, par la force même des circonstances, à établir, à l'instar des autres pays, des droits différentiels sur les produits similaires des pays étrangers, selon le traitement que ces pays accordent aux importations de Russie.

Cette mesure n'a qu'un seul but, celui de sauvegarder les intérêts économiques du pays. Le gouvernement impérial, attachant un grand prix au maintien d'un seul tarif, avait jugé possible de temporiser et il retarda d'une année et demie la promulgation de la nouvelle loi douanière, destinée uniquement à rétablir l'équilibre dans les conditions réciproques d'échange, ébranlé à notre désavantage par la nouvelle direction de la politique douanière en Europe. Le gouvernement russe s'est décidé à substituer au tarif unique un double tarif, seulement après avoir acquis la conviction que le système des tarifs conventionnels, englobant un grand nombre d'articles et, entre autres, tous ceux qui intéressent notre exportation, était devenu en Europe suffisamment stable.

L'établissement de deux tarifs douaniers, dont l'un, aux droits majorés, serait applicables aux provenances des pays qui n'accordent pas aux produits russes des facilités douanières équivalentes à celles octroyées à d'autres pays, et le second, aux droits plus réduits, destiné aux provenances des pays qui font bénéficier nos produits des tarifs les plus réduits, devenait indispensable, d'abord pour servir de base aux arrangements commerciaux qu'il serait désirable de conclure ultérieurement, et ensuite comme moyen d'avantager l'importation en Russie de produits des pays qui nous accordent déjà le traitement de la nation la plus favorisée.

Le gouvernement impérial s'est inspiré des considérations suivantes pour déterminer la forme dans laquelle pouvait s'effectuer en Russie l'établissement d'un double tarif douanier : —

1. Le tarif général actuel, qui date de 1891, a été lors de son élaboration minutieusement approprié aux besoins financiers et économiques du pays.

2. Les droits de ce tarif ont été calculés sur la base d'un cours moyen du rouble papier susceptible d'amélioration tout en faveur de l'importation de l'étranger.

3. En fixant le taux des droits du tarif de 1891, le gouvernement prévoyait d'autant moins la possibilité d'une réduction conventionnelle de ces droits dans un avenir prochain, qu'à cette époque il avait la ferme intention de rendre ce tarif aussi stable que possible.

Dans cet ordre d'idées et afin de ne pas entraver inutilement le commerce d'importation, le gouvernement a trouvé possible d'admettre dans le tarif de 1891 un assez grand nombre de dégrèvements comparativement au tarif de 1890.

Il résulte de ces considérations que l'établissement de deux tarifs ne pouvait pas s'effectuer par la voie seule de l'abaissement des droits du tarif général, ce tarif ne pouvant subir une réduction bien notable de ses droits. Même en reconnaissant la possibilité d'accorder, à titre de réciprocité, une certaine réduction de ces droits, dans des limites raisonnables, on n'aurait pas pu établir une marge suffisante entre les tarifs maximum et minimum, car cette marge atteint dans certains pays, pour les articles les plus protégés et intéressant particulièrement notre exportation, 30 pour cent et au delà.

Par conséquent le gouvernement a jugé nécessaire d'adopter les bases suivantes pour l'établissement d'un double tarif:

Le tarif actuellement en vigueur, avec les changements éventuels ultérieurs, sera considéré comme tarif minimum et sera applicable à tous les pays qui, de leur côté, nous accorderont les conditions les plus favorables d'importation et de transit.

Pour le tarif maximum, une surtaxe de 30 pour cent sera établie principalement sur les produits fabriqués, de 20 pour cent principalement sur les produits préparés pour la fabrication. Les matières brutes, propres à la fabrication, ainsi que la plupart des produits de consommation n'ont pas été portés sur la liste du tarif maximum.

Il a été tenu compte, en outre, de l'importation en Russie de produits extra-européens par un pays d'Europe, qui réalise dans ce cas les bénéfices de l'entrepôt et du transit. Il a été jugé conforme à l'idée du double tarif d'établir pour ce genre d'importation une différence de traitement, selon que les produits extra-européens sont importés chez nous d'un pays européen qui favorise le plus notre importation, ou bien d'un pays qui ne nous accorde pas un traitement de faveur. Dans ce dernier cas, l'importation des produits extra-européens (dont la liste est indiquée dans la loi sur le double tarif) devra être frappée d'une surtaxe de 15 pour cent.

II.—“ Journal de St. Pétersbourg,” July 9, 1893.

Le “ Bulletin des Lois ” paru aujourd'hui, 26 juin (No. 90), publie, en russe et en français, le texte de la convention commerciale conclue entre la Russie et la France le 5 (17) juin 1893 et dont les ratifications ont été échangées à St. Pétersbourg le 19 juin (1 juillet) 1893. Voici ce texte:—

S. M. l'Empereur de toutes les Russies et le président de la république française, désirant favoriser le développement des relations commerciales entre les deux pays, ont décidé de conclure une convention spéciale à cet effet en ce qui concerne certains articles des tarifs douaniers respectifs et ont nommé à cet effet pour leurs plénipotentiaires, savoir:

S. M. l'Empereur de toutes les Russies:

M. Serge Witte, son conseiller privé et ministre des finances,

et

M. Nicolas Chichkine, son conseiller privé et adjoint du ministre des affaires étrangères,

et le président de la république française:

M. Louis-Gustave Lannes, comte de Montebello, ambassadeur extraordinaire et plénipotentiaire de la république française près S. M. l'Empereur de toutes les Russies,

lesquels, après s'être communiqué leurs pleins pouvoirs respectifs, trouvés en bonne et due forme, sont convenus des articles suivants:

Articles 1. Indépendamment des avantages assurés en France (1886)

à tous les produits russes, par le traité signé le 1 avril 1874 entre les deux pays, les huiles minérales russes spécifiées ci-dessous et importées directement de Russie, bénéficieront de l'application du tarif minimum, à savoir :

A. Huiles de pétrole, de schiste et autres huiles minérales propres à l'éclairage :

(1) Huiles brutes, neuf francs les 100 (cent) kilos.

(2) Huiles raffinées et essences, dix francs l'hectolitre.

B. Huiles lourdes et résidus de pétrole et d'autres huiles minérales, neuf francs les 100 (cent) kilos.

Article 2. Indépendamment des avantages assurés en Russie à tous les produits français par le traité signé le 1 avril 1874, entre les deux pays, les produits français énumérés ci-dessous et munis de certificats d'origine, bénéficieront des réductions de droits suivantes : (Tarif des douanes russe du 11 juin 1891).

Paragraphe 13. Pâtés; condiments divers, tels que : moutarde préparée, soya, pickles; câpres, olives vertes et noires, légumes, fruits et autres aliments de toute espèce à l'huile, au vinaigre ou autrement préparés (en conserves), importés en récipients de verre, de terre cuite, de fer-blanc ou autres hermétiquement fermés, hormis ceux spécialement dénommés; par poud brut cinq roubles or; réduction : quinze pour cent.

Remarque.— Les câpres, olives vertes, olives noires, concombres et autres légumes préparés au vinaigre, importés dans toute espèce de récipients; les extraits de viande—acquittent les droits d'après ce paragraphe.

Sec. 24, alinéa 1. Bonbons, confitures, sirops de sucre avec mélanges améliorants; sirops de fruits et de baies; pâte de fruits (pastila), gelée, poudres et pastilles de fruits avec sucre, fruits au rhum, en liqueurs, au cognac, en sirop et en jus; lait concentré et autres substances alimentaires au sucre, chocolat avec ou sans sucre; cacao broyé avec sucre; par poud brut, neuf roubles soixante or; réduction : quinze pour cent.

Sec. 27. Arack, rhum, eau-de-vie de France (de raisins), cognac, eau-de-vie de prunes (slivovitza), kirsch, gin, whysky, alcool de grains, et eau-de-vie de grains, sans mélanges améliorants :

(1) Importés en fûts et barils, par poud brut, douze roubles or; réduction : dix pour cent.

(2) Importés en bouteilles, ainsi que liqueurs et infusions spiritueuses avec ou sans sucre, importées en récipients de toute sorte; par bouteille ($\frac{1}{30}$ de védro), un rouble or; réduction : quinze pour cent.

Sec. 28. Vins de raisin et de baies :

(2) Non mousseux, en bouteilles ($\frac{1}{30}$ de védro), quarante-cinq copecs or par bouteille; réduction : quinze pour cent.

(3) Mousseux de toute espèce, la bouteille un rouble quarante or; réduction : quinze pour cent.

Sec. 32. Eaux minérales, naturelles ou artificielles, la cruche ou la bouteille quatre copecs or; réduction : dix pour cent.

Sec. 35. Fromage, par poud, six roubles or; réduction : dix pour cent.

Remarque.—Les fromages importés dans des enveloppes de plomb ou de fer-blanc acquittent les droits conjointement avec le poids de ces enveloppes.

Sec. 37. Poisson :

(2) Mariné, à l'huile ou farci, de toute espèce; caviar, par poud brut, cinq roubles or; réduction : quinze pour cent.

Sec. 55. Peaux préparées :

(2) Maroquin, peaux glacées, chevreau, chagrin; peaux de tout genre avec ornements pressés; peaux laquées, petites, par poud, quinze roubles or; réduction : quinze pour cent.

(4) Peaux laquées, grandes, par poud, huit roubles cinquante or; réduction : quinze pour cent.

Sec. 57. Ex-alinéa 2. Chaussures pour dames, en chevreau, achevées ou non achevées, par livre, deux roubles or; réduction : quinze pour cent.

Ex-alinéa 3. Gants en peau de toute espèce, par livre, trois roubles or; réduction : quinze pour cent.

Sec. 61. Ex-alinéa 3. Cadres et baguettes, par poud, six roubles or; réduction : vingt-cinq pour cent.

Sec. 65. Ex-alinéa 4. Ciments de toutes dénominations (de Portland, artificiel ou naturel, romain, mélangé, de scories et autres), par poud, dix copecs or; réduction : dix pour cent.

Sec. 75. Ouvrages en faïence :

(2) Avec dessins, bords, bordures d'une seule couleur, ouvrages en faïence non coloriés en pâte; le poud, un rouble quarante or; réduction : dix pour cent.

Sec. 76. Ex-alinéa 1. Majolique de toute espèce même avec moulures, par poud, cinq roubles trente or; réduction : vingt-cinq pour cent.

Sec. 112. Produits chimiques et pharmaceutiques non spécialement dénommés, par poud brut, deux roubles quarante or; réduction : vingt-cinq pour cent.

Remarque.—L'acide carbonique à l'état liquide et les autres esprits réduits à l'état de liquides, en bouteilles métalliques, acquittent les droits d'après le Sec. 112; 80 pour cent du poids total sont taxés d'après la matière dont sont faites les bouteilles.

Sec. 113. Médicaments composés (préparés) dont l'importation est autorisée d'après des listes spéciales, par poud brut, vingt roubles or; réduction : vingt pour cent.

Remarque.—Ces listes sont dressées par le conseil médical près le ministère de l'intérieur, d'accord avec le ministère des finances.

Sec. 117. Alinéa 1. Huiles grasses (huile d'olives, de laurier, de coton et autres semblables), hormis celles spécialement dénommées, huile cuite siccative (olifa), par poud, deux roubles vingt or; réduction : dix pour cent.

Sec. 118. Eaux aromatiques sans addition d'alcool, telles que : eau de laurier-cerise, de menthe, de fleurs d'oranger, de rose et autres semblables, par poud, cinq roubles trente or; réduction : dix pour cent.

Sec. 119. Cosmétiques :

(1) Eaux de senteur alcooliques (eau de Cologne et autres),
(1686)

vinaigre de toilette, fard blanc et rouge, compositions pour la teinture des cheveux, pastilles odorantes à brûler, cosmétiques de toute espèce non spécialement dénommés, conjointement avec le poids des flacons, vases, boîtes ou autres enveloppes, par poud, seize roubles or; réduction: quinze pour cent;

(2) Parfums, sauf les eaux de senteur dénommées à l'alinéa 1 du présent paragraphe, ainsi que la pommade, par poud brut, trente-cinq roubles or; réduction: quinze pour cent.

Sec. 147. Zinc:

(1) En saumons et débris, par poud, cinquante copecs or; réduction: dix pour cent.

(2) En feuilles, même planées et polies, par poud, un rouble or; réduction: dix pour cent.

Remarque.—Les feuilles recouvertes de nickel ou d'autres métaux communs acquittent 30 pour cent en sus des droits fixés à l'ali. éa 2 du présent paragraphe.

Sec. 149. Ouvrages en cuivre, alliages de cuivre et autres métaux non précieux et leurs alliages dénommés au Sec. 143;

(2) Avec ornements en relief au gravés (hormis les ornements pressés), garnis ou non garnis, recouverts ou non recouverts de patine, montés ou non montés, par poud, seize roubles or; réduction: dix pour cent.

Sec. 150. Fonte de fer ouvree:

(1) Pièces en fonte sans retouche, par poud, soixante-quinze copecs or; réduction: dix pour cent.

(3) Ouvrages en fonte retouchés, limés, polis, taillés, peints, bronzés, étamés, recouverts de vernis, d'émail (hormis la vaisselle), de zinc ou d'autres métaux communs, même avec parties de bois, de cuivre ou d'alliages de cuivre, par poud, un rouble soixante-dix or; réduction: dix pour cent.

Remarque.—L'alinéa 3 du présent paragraphe s'applique à tous les ouvrages en fonte forgée, non retouchés, aussi bien qu'à ceux retouchés, s'ils pèsent plus de 5 livres la pièce; les ouvrages en fonte forgée retouchés pesant 5 livres et moins par pièce, acquittent les droits d'après l'alinéa 2 du Sec. 153.

Sec. 153. Ouvrages en fer et en acier, hormis ceux spécialement dénommés, façonnés, tournés, polis, taillés, bronzés, ou ayant subi quelque autre façon, avec ou sans parties en bois, cuivre ou alliages de cuivre, pesant par pièce:

(1) Plus de cinq livres, par poud, un rouble soixante-dix or; réduction: dix pour cent.

(2) Cinq livres et moins, par poud, deux roubles soixante-dix or; réduction: dix pour cent.

Sec. 156. Ouvrages en fil d'archal:

(1) En fil de fer et d'acier.

(Sub-division b.) Rubans de cardes et cardes de tout genre, par poud, quatre roubles quarante or; réduction: vingt pour cent.

(3) Clous en fil d'archal, clous de cordonnier, clous de tapissier dits semences, clous à ferrer, clous en fonte forgée, rivets, goupilles et chevilles pour pianos, par poud, deux roubles soixante-dix or; réduction: dix pour cent.

Sec. 160. Faux et faucilles, hache-paille et serpes, ciseaux à tondre les moutons, bèches, pelles, rateaux, houes et fourches, par poud, un rouble quarante or; réduction: quinze pour cent.

Sec. 161. Outils pour arts, métiers, fabriques et usines, par poud, un rouble quarante or; réduction: quinze pour cent.

Sec. 167. Machines, appareils et leurs modèles, complets ou non complets, montés ou non montés:

(2) Gazomètres, compteurs à eau, moteurs à gaz, à air chaud, à pétrole; machines magnito; machines à coudre et à tricoter; locomobiles (hormis ceux dénommés à l'alinéa 5); tenders, pompes à incendie (hormis celles dénommées à l'alinéa 3); machines de toute espèce non spécialement dénommées en fonte, fer, acier, avec ou sans parties en autres métaux; par poud un rouble soixante-dix or; réduction: dix pour cent.

(4) Machines et appareils agricoles non pourvus de moteurs à vapeur et non spécialement dénommées, ainsi que leurs modèles, par poud, soixante-dix copecs or; réduction: vingt-cinq pour cent.

Sec. 169. Instruments et appareils de mathématiques, de dessin linéaire, de physique, de chimie et de chirurgie (y compris les bandages); appareils et accessoires télégraphiques, téléphoniques, photographiques, appareils pour l'éclairage électrique; manomètres, indicateurs, anémomètres, hydromètres, compteurs; sphères géographiques, verres à lunettes, à lorgnettes, verres ardents, loupes, verres d'optique de toute espèce et prismes sans monture, par poud, huit roubles or; réduction: quinze pour cent.

Remarque 1.—Les ustensiles pour les travaux de laboratoire, ceux employés en médecine et dans les pharmacies, en argile, en grès, verre, porcelaine, etc., acquittent les droits d'entrée d'après les paragraphes correspondants du tarif, selon la matière dont ils sont faits.

Remarque 2.—Acquittent de même les droits d'entrée d'après les paragraphes correspondants du tarif, les parties de rechange des éléments électriques, des batteries et autres appareils, importées séparément, qui s'anéantissent par l'usage et qu'il faut remplacer, telles que: plaques de zinc, de cuivre et autres pour éléments, charbons de cornues pour piles, pour lampes et lanternes.

Sec. 172. Instruments de musique:

(2) Pianinos, par pièce quatre-vingts roubles or; réduction: vingt pour cent.

(4) Instruments de musique de tout genre, non spécialement dénommés; accessoires d'instruments de musique, importés séparément, tels que: archets, cordes en boyau ou en soie (les cordes métalliques sont sujettes aux droits du paragraphe 155), claviers, martelets (les chevilles pour pianos sont sujettes aux droits du paragraphe 156, alinéa 3), métronomes, diapasons, crans, par livre, vingt copecs or; réduction: vingt pour cent.

Remarque.—Les instruments de musique acquittent les droits, conjointement avec le poids des boîtes et des étuis qui leur sont propres.

Sec. 177. (6) Papier à écrire, pour ouvrages de typographie, de lithographie, de reliure et de confiserie, avec ornements, tels que: dorure, argenture, bronzage, impressions, découpures en dentelles, de-sins, appliques, bordures; armoiries, chiffres, images, etc., papier à cigarettes, papier fin à envelopper dit de Chine; papier colorié sur un côté ou sur les deux côtés (mais non colorié en pâte); ouvrages en papier, enveloppes, abat-jours, fleurs artificielles en papier, et autres, par poud, dix roubles soixante or; réduction: dix pour cent.

Sec. 199. Etoffes tissées et tricotées, non spécialement dénommées, en laine ou en poil de chèvre, unies, chinées avec ou sans mélange de coton:

(b) En tissu de laine peignée ou avec mélange de ce tissu, par livre, un rouble cinquante or; réduction: vingt pour cent.

Sec. 205. (1) Ouvrages tricotés même avec traces de couture:

(b) En demi-soie, par livre, trois roubles or; réduction: dix pour cent.

(c) De toute autre espèce, par livre, un rouble or; réduction: vingt pour cent.

(2) Cordons et tresses de passementerie et de bonneterie, agréments, franges, glands, garnitures et autres ouvrages tressés:

(a) En soie et demi-soie, par livre, trois roubles or; réduction: dix pour cent.

(b) De toute autre espèce, par livre, un rouble or; réduction: vingt pour cent.

Remarque.—Les ouvrages dénommés aux alinéas 1 c. et 2 b. avec mélange de soie et de clinquant (or ou argent faux) en guise d'ornements, acquittent 30 pour cent en sus des droits d'entrée fixés par lesdits alinéas

Sec. 207. (1) Dentelles de toute sorte, faites à la main, dentelles de soie faites à la machine (blondes), broderies et entre-deux de soie, par livre, sept roubles cinquante or; réduction: dix pour cent.

Sec. 209. (7) Chapeaux et autres coiffures de tout genre pour dames, garnis de rubans, de fleurs, de plumes, etc., par livre, dix-huit roubles or; réduction: quinze pour cent.

Sec. 210. Ex-alinéa 1. Chapeaux en poil, demi-poil, feutre, achevés ou préparés, par pièce, un rouble vingt or; réduction: vingt-cinq pour cent.

Sec. 213. Plumes apprêtées d'autruche, marabout, d'oiseaux de paradis et autres semblables, plumages et tissus en plumes pour garniture de vêtements; fleurs artificielles, hormis celles en porcelaine, faïence, papier et cuir; plantes décoratives artificielles, avec mélange de matières précieuses, par livre brute, huit roubles or; réduction: quinze pour cent.

Remarque 1.—Les plumes et les peaux d'oiseaux rares ou communs garnies de plumes imitant les plumes de prix, non apprêtées, ainsi que les parties détachées de tout genre de fleurs artificielles, acquittent un droit d'entrée de quatre roubles or par livre; réduction: quinze pour cent.

Sec. 215. Articles de mercerie et de toilette, non spécialement dénommés, montés ou non montés; jouets d'enfants:

(1) Mercerie fine, contenant des matières de prix, telles que: soie, aluminium, nacre, corail, écaille, ivoire, émail, ambre et autres matières précieuses, métaux dorés ou argentés et compositions métalliques, ouvrages de toute espèce non spécialement dénommés, en nacre, écaille, ivoire et ambre, par livre, deux roubles or; réduction: dix pour cent.

(2) Mercerie commune avec parties, montures ou ornements en métaux non précieux et alliages métalliques (non dorés ou non argentés) en corne, os, bois, porcelaine, pierres gemmes, verre, écume de mer, baleine, jais, celluloïde, lave et autres matières de bas prix, ouvrages de toute espèce, non spécialement dénommés, en corne, os, écume de mer, baleine, jais, celluloïde, lave et cire, par livre, cinquante copecs or; réduction: vingt pour cent.

Remarque 3.—Les étuis des objets auxquels s'applique le présent paragraphe, acquittent les droits, selon les matières dont ils sont confectionnés.

Un arrangement ultérieur déterminera, pour chaque paragraphe, en francs et en roubles la quotité correspondante des droits spécifiques réduits sur la base indiquée ci-dessus.

Au cas où le gouvernement impérial serait amené à promulguer un double tarif douanier, le bénéfice de l'application du tarif le plus réduit sera de plein droit attribué aux produits d'origine française.

Article 3.—La présente convention sera ratifiée et les ratifications en seront échangées à Saint-Petersbourg le 19 juin (1 juillet) 1893; elle entrera en vigueur le 30 juin (12 juillet) de la même année et demeurera exécutoire jusqu'à l'expiration d'une année à partir du jour où l'une ou l'autre des hautes parties contractantes l'aura dénoncée.

En foi de quoi les plénipotentiaires respectifs l'ont signée, et y ont apposé le cachet de leurs armes.

Fait à Saint-Petersbourg le cinq (dix-sept) juin de l'an de grâce mil huit cent quatre-vingt-treize.

(L.S.) Signé: SERGE WITTE.

(L.S.) Signé: N. CHICHKINE.

(L.S.) Signé: G. DE MONTEBELLO.

A ces causes, après avoir suffisamment examiné cette convention, Nous l'avons agréée, confirmée et ratifiée, comme par les présentes Nous l'agréons, confirmons et ratifions, promettant sur Notre parole impériale pour Nous, Nos héritiers et successeurs que tout ce qui a été stipulé dans ladite convention sera observé et exécuté inviolablement. En foi de quoi Nous avons signé de Notre propre main la présente ratification impériale et y avons fait apposer le sceau de Notre Empire.

Donné à Péterhof le quatorze juin de l'an de grâce mil huit cent quatre-vingt-treize et de Notre règne la treizième année.

L'original est signé de la propre main de S. M. l'Empereur ainsi :

ALEXANDRE.

(L.S.)

(Contresigné) : Le ministre des affaires étrangères, secrétaire d'Etat : N. GIERS.

III.—“ Journal de St. Pétersbourg,” July 29, 1893.

Le ministre des finances accompagne l'envoi du texte de l'ordre impérial du 9 juillet, sur l'application du tarif maximum, d'une circulaire expliquant aux bureaux de douane que ledit tarif sera appliqué jusqu'à nouvel ordre aux produits du sol et de l'industrie de l'Allemagne et de ses colonies, ainsi qu'aux produits des pays extraeuropéens dans le cas où ils seraient importés par la voie d'Allemagne.—“ *Messenger Officiel*.”

IV.—“ Journal de St. Pétersbourg,” July 30, 1893.

Le “ *Journal du Ministère des Finances* ” publie l'article suivant dans son numéro du 18 (30) juillet :

Les surtaxes du tarif douanier russe établies par la loi du 1 juin 1893 et qui, à partir du 20 juillet, seront appliquées aux importations d'Allemagne, ont été calculées de façon à correspondre aux surtaxes dont l'Allemagne a frappé déjà depuis un an et demi les principaux articles russes d'exportation. Ainsi, notre tarif maximum n'a nullement le caractère de représailles à l'égard des importations d'Allemagne; il ne fait que rétablir l'équilibre, et encore pas entièrement, dans les conditions économiques de notre commerce avec l'Allemagne, équilibre que cette dernière a rompu en frappant depuis le commencement de l'année 1892 notre principal article d'exportation, c'est-à-dire les blés russes, d'un droit d'entrée de 43 pour cent plus élevé que les droits auxquels sont soumis en Allemagne les blés importés d'autres pays, tandis que les surtaxes les plus élevées établies pour notre tarif maximum, qui est seulement sur le point d'entrer en vigueur, ne présentent pour les importations d'Allemagne, comparativement aux droits dont sont frappés en Russie les articles de même nature importés d'autres pays, qu'une augmentation de 30 pour cent.

Cependant l'Allemagne peut encore créer une nouvelle entrave extraordinaire à notre exportation en relevant de 50 pour cent les droits en vigueur, droits qui sont, comme il est dit plus haut, relativement plus élevés que ceux du tarif russe vis-à-vis des importations d'Allemagne, car d'après la législation douanière allemande, le gouvernement a le droit d'appliquer une pareille mesure à tout pays où les importations d'Allemagne auraient à payer des droits plus élevés que ceux auxquels sont soumis les articles similaires importés d'autres pays. La législation austro-

hongroise contient une clause analogue, avec la différence seulement que la surtaxe y est limitée à 30 pour cent.

Le cas n'ayant pas été prévu par notre législation, cette lacune est comblée par l'ordre impérial promulgué aujourd'hui.

Aux termes dudit ordre impérial, le ministre des finances, de concert avec le ministre des affaires étrangères, a le droit d'établir des surtaxes spéciales sur les importations de tous les pays où nos exportations seraient spécialement frappées de droits plus élevés que ceux du tarif général. Ce relèvement de droits s'effectuerait de manière à être proportionné aux nouvelles surtaxes dont les exportations russes seraient frappées dans le pays respectif et il aurait pour base, en partie les surtaxes établies par la loi du 1 juin pour le tarif maximum et en partie les taux normaux de notre tarif général.

V.—“Journal de St. Pétersbourg,” July 31, 1893.

Sur le rapport du ministre des finances, S. M. l'Empereur a daigné ordonner, en date du 16 juillet, savoir :

Le ministre des finances est autorisé, de concert avec le ministre des affaires étrangères, à prendre les dispositions ci-après, en les portant à la connaissance publique :

(1) Etablir des surtaxes spéciales applicables aux importations de tous pays où les exportations russes seraient frappées de droits plus élevés que ceux du tarif général; ces surtaxes devront être proportionnées aux surtaxes dont les exportations russes seraient frappées dans le pays respectif et elles auront pour base : (a) les taux relevés du tarif général russe du 11 juin 1891, tels qu'ils ont été établis par la loi du 1 juin 1893, sur le double tarif, dans toutes leurs subdivisions; et (b) les taux normaux du même tarif, en tant que les dispositions du ministre porteraient sur des articles qui n'ont pas été frappés de surtaxes par la loi du 1 juin 1893; (2) suspendre temporairement ou abroger, à son gré, les dispositions sub. 1; et (3) fixer à son gré, au besoin par télégraphe, les termes de la mise en vigueur de la suspension ou de la cessation desdites dispositions.—“Journal du Ministère des Finances.”

VI.—“Journal de St. Pétersbourg,” August 2, 1893.

(a)

CIRCULAIRE DU MINISTRE DES FINANCES AUX DOUANES.

En conséquence de l'ordre impérial du 16 juillet (No. 104 du “Bulletin des Lois”) concernant l'application de droits d'entrée spécialement augmentés, le ministre des finances, conjointement avec le ministre des affaires étrangères, a statué ce qui suit :

A. Les droits d'entrée sur les produits du sol et de l'industrie de l'Allemagne et de ses colonies extraeuropéennes seront augmentés de 50 pour cent. Cette augmentation sera

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D

calculée, pour les marchandises énumérées aux articles 1 et 2, Sec. II, de la loi du 1 juin 1893 (circulaire du ministre des finances du 14 juillet courant, No. 14484), sur la base des droits d'entrée fixés par ladite loi; pour toutes les autres marchandises, sur la base des droits d'entrée fixés par le tarif douanier du 11 juin 1891.

B. Le présent arrêté entrera en vigueur le 21 juillet courant.

C. Les augmentations indiquées plus haut ne seront pas applicables aux marchandises en entrepôt douanier au moment de l'entrée en vigueur de cet arrêté, ainsi qu'aux marchandises dont les documents (connaissements, lettres de voiture) seront présentés aux douanes d'entrée dans le courant de la journée du 21 juillet jusqu'à la fermeture des bureaux (art. 56 du code douanier, édition de 1892).

(b)

AVIS DU DÉPARTEMENT DES DOUANES.

En vertu de la règle générale exposée dans l'article 827 du code douanier les navires étrangers arrivant dans les ports de la Russie sont soumis à un droit de tonnage s'élevant à 1 rouble par deux tonneaux (soit 1 *last*). Il n'est fait d'exception à cette règle qu'à l'égard des pays dont le pavillon, en vertu de traités de réciprocité, jouit, par rapport aux droits de douane et de navigation, des mêmes privilèges que les navires russes, lesquels ne payent que 5 cop. par *last*.

Il s'ensuit qu'en l'absence de cette réciprocité ou dans les cas où la réciprocité ne serait pas observée, il y a lieu d'appliquer la règle générale selon laquelle le droit de tonnage est payable au maximum (à 1 rouble par *last*).

Vu ces considérations, le département des douanes a prescrit aux douanes d'appliquer à partir de ce 20 juillet aux navires allemands le droit de tonnage de 1 rouble par *last* (soit deux tonneaux), lors de l'arrivée, ainsi qu'au départ.

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1260. Hiogo and Osaka	2½d.	1321. Rio de Janeiro	3d.
1261. Damascus	1d.	1322. Réunion	3½d.
1262. Samoa	½d.	1323. Berne	1d.
1263. Rio Grande do Sul	2½d.	1324. Kiukiang	7d.
1264. Jeddah	1d.	1325. Roshir	3½d.
1265. Yokohama	3d.	1326. Florence	1d.
1266. Shanghai	3d.	1327. H. & S. date	1d.
1267. Hongkong	1½d.	1328. Paris	2d.
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1269. Cadiz	2d.	1330. St. Petersburg	2½d.
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1272. Christiania	5d.	1333. Loanda	1d.
1273. Buda-Pesth	½d.	1334. Bordeaux	2½d.

No. 1335.

Reference to previous Report, Annual Series No. 1155.

RUSSIA.

TAGANROG.

Acting-Consul Walton to the Earl of Kimberley.

My Lord,

Taganrog, March 5, 1894.

HEREWITH I have the honour to transmit a Report, compiled from official returns, on the Harvest of 1893, in the Provinces comprised in this Consular District, and also those from the Vice-Consuls at Kertch, Berdiansk, and Rostov-on-Don.

I have, &c.

(Signed) W. S. WALTON.

Report on the Harvest in the Consular District of Taganrog for the Year 1893.

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TAGANROG.

Don Cossack Territory.

The weather in this territory was rather damp throughout the first part of the summer; rain fell frequently, flooding the low-lands and beating down the crops. But on July 30 excessive heat, accompanied by burning winds, set in, and the temperature rose to + 30° R. and + 40° R. This lasted until August 13, and much damage was done to the crops, the grains, especially the spring wheat, being completely shrivelled up. Barley and oats were less affected; but azima wheat, on the other hand, was also of very poor quality in some districts.

Winter and
spring
sowings

Generally speaking, the crops of both winter and spring sown grain were good; but owing to the heavy rains which prevailed during the latter part of the harvesting season, threshing was greatly impeded, and the grain was warehoused in a more or less damp condition.

Linseed and
hemp.
Yield.

Linseed and hemp were fairly good throughout the territory.

The average yield of the different kinds of grain per acre was as follows:—winter wheat, 14 bushels; rye, 11 bushels; spring wheat, 16 bushels; barley, 30 bushels; and oats, 24 bushels.

Ekaterinoslav.

This province also suffered from an over abundance of rain. After a cold spring, warm weather set in towards the end of May, but did not last long, and from early June to the end of July it rained incessantly with few breaks. This was again followed by hot weather, and the thermometer at times stood at + 40° R. In many districts the crops having been laid by the heavy rains suffered greatly from the subsequent heat, and consequently the grain was shrivelled up and of light weight. In some parts of this province the grain is also damp owing to rain having fallen while threshing operations were being carried on.

Winter
sowings

The rye crop was on the whole slightly above the average. In the Mariupol, Ekaterinoslav, and Pavlograd districts the crop was an average one; in the Alexandrovsk circuit it was below the average, and in the remaining districts above the average. Winter wheat gave good results in the Mariupol and Novomoskovsk districts only; in the other parts of the province it was either below the average or a complete failure. The qualities of the grain also varied very much.

Spring
sowings

Of spring-sown grain the best results were given by barley, oats, and maize. Barley was very good throughout the province, the only exception being the Mariupol district, where it was slightly inferior, but still above the average. Oats and maize were good in all the districts. Spring wheat and millet seed were above the average, and in some parts even good. Peas and buckwheat were somewhat below the average.

Linseed and hemp gave good results, the average yield of the former being above 7 bushels per acre. Linseed and hemp. Yield.

The average yield in this province was as follows:—winter wheat, 7 bushels; rye, 11 bushels; spring wheat, $13\frac{1}{2}$ bushels; barley, 24 bushels; and oats, 27 bushels per acre.

Kuban Territory.

The weather in this territory proved rather unfavourable to the crops. During the first part of the season it was cool, and rain fell frequently, greatly retarding the ripening of the crops, and the latter part was hot, accompanied by drought and scorching winds, which shrivelled and dried up the grain. Hail storms were also very numerous, and the damage sustained by the crops was very heavy.

Rye, with the exception of in the Temriuk district, where it was below the average, gave a fair crop. Wheat was also fairly good, taken on the whole, the only exceptions being the Ekaterinodar and Temriuk districts, where it was much below the average, and in some parts a complete failure. Winter sowings.

Wheat gave a satisfactory crop. Oats and barley were good in most of the circuits; millet seed gave an average yield; peas and buckwheat were fair; but maize was, on the whole, below the average. Spring sowings.

The linseed crop was unsatisfactory in some parts, but in others was very fair, and the yield varied between 4 bushels and 20 bushels per acre. Hemp gave fair returns and rapeseed was also above the average. Linseed. Hemp and rapeseed.

The yield in this territory, in bushels per acre, may be taken as follows:—winter wheat, 13 bushels; rye, 12 bushels; spring wheat, 12 bushels; barley, 20 bushels; and oats, 24 bushels. Yield.

Ter Territory.

In this territory the weather, in the early part of the summer, was more or less favourable for the crops, with frequent and heavy rains; in mid July, however, drought set in, accompanied by excessive heat and north-easterly winds which greatly retarded the filling of the ears, and the grain was consequently very small berried and of light weight.

Winter sown grain in most parts gave poor results, the yield not coming up to the average. Winter sowings.

Spring sowings on the other hand gave better results, and in several districts the yield was even above the average. Maize suffered from the drought, and may be set down as a total failure. Spring sowings.

Linseed, on the whole, gave an average yield.

The average yield per acre in this territory was as follows:—winter wheat, 16 bushels; rye, 10 bushels; spring wheat, 16 bushels; barley, 16 bushels; and oats, 14 bushels per acre. Linseed. Yield.

(1696)

Stavropol.

The weather in this province was favourable during the first part of the summer, when the temperature was low and rain fell frequently, but the latter part was hot, with drought and frequent strong easterly winds preventing the crop from ripening.

Winter and
spring
sowings.

The winter and spring sowings, although not coming up to expectations, gave fair results and in some places a good crop was gathered. Rye and spring wheat gave about an average yield.

Hemp and
mustard seed.
Yield.

Hemp and mustard seeds, on the whole, came out very well. The average yield in this province may be taken as follows:—winter wheat, 18 bushels; rye, 8 bushels; spring wheat, 18 bushels; barley, 20 bushels; and oats, 22 bushels per acre.

Astrakhan.

During the summer in this province it was very hot and dry, accompanied by strong winds and heavy gales. During May and June no rain fell whatever, and in July the fall was very small and the area covered very restricted. This naturally had a serious effect on the crops, and they turned out very badly.

Winter and
spring
sowings.

The crop of both winter and spring sown grain was a failure owing to the aforementioned causes, and to make matters worse, scoushiks and locusts made their appearance and completely devastated large tracts of land. The bulk of the rye was cut down for fodder, and the yield of that harvested was very uneven. In several districts not even the seed was returned, and the same may be said with respect to spring sown grain.

Yield.

The yield per acre on the average was as follows:—rye, 3 bushels; spring wheat, 4 bushels; barley, 6 bushels; and oats, 5 bushels per acre.

Voronej.

Plenty of rain fell in this province during the early part of the summer, but during the latter part the weather completely changed, and it was very hot accompanied by drought and strong winds, and at times the thermometer stood at $+40^{\circ}$ R., which naturally affected the ripening of the corn and the quality of the grain left much to be desired in consequence.

Considerable damage was also done in some parts by hail-storms which prevailed during the summer.

Winter
sowings.

Rye gave fair results in nearly all the circuits, the exceptions being Pavlovsk, Biruchensk, and Nijnedevitsk districts, where the yield was slightly below the average. Wheat in the last-mentioned circuits came out about the average, but in the remaining districts the yield was a little above the average.

Spring
sowings.

Of the spring sown grain oats and barley gave the best results, and in most cases the yield was above the average, the only exception being the Voronej district. With the exception

of in the Pavlovsk and Bogocharsk districts, where the yield was below the average, wheat gave good results throughout the province. Maize also yielded well. Generally speaking, however, the quality of the grain was far from satisfactory.

Rapeseed, linseed, hemp, and aniseed, on the whole, gave ^{Seeds.} very fair crops.

In this province the average yield per acre was as follows:— ^{Yield.} winter wheat, 14 bushels; rye, 13 bushels; spring wheat, 15 bushels; barley, 20 bushels; and oats, 23 bushels.

Saratov.

In this province the weather was very variable. During the first part of the summer, with the thermometer standing at + 25° R. rain fell in abundance, but the latter part was hot and dry and the temperature rose to + 40° R., causing, in some parts, considerable damage to the rye, oats, and late spring sowings. Hailstorms were very frequent during the summer, and the losses sustained were very heavy.

Winter sown grain, on the whole, gave poor results, and the ^{Winter} yield was below the average, only in the Balashovsk districts was ^{sowings.} a fair crop of rye gathered.

Spring sowings, taking the whole of the province, gave almost ^{Spring} an average yield, the best returns being given by peas, and the ^{sowings.} worst by buckwheat and millet seed, which suffered considerably from drought. Maize gave a medium yield.

Rape and mustard seed gave poor results, having suffered ^{Seeds.} from the excessive heat and insects. Hemp, on the other hand, gave a good crop.

Taking the average, the yield in the province of Saratov was ^{Yield.} as follows:—winter wheat, 12 bushels; rye, 11 bushels; spring wheat, 10 bushels; barley, 13 bushels; and oats, 19 bushels per acre.

Samara.

The weather here was, generally speaking, unfavourable; the drought in May was followed by rain which fell frequently during June and part of July. During the latter part of that month, however, drought and strong hot winds again set in and the growing crops suffered considerably. At the end of July rain again fell, somewhat improving the state of the crops, and all would have been well had it kept fine during August; but, on the contrary, it continued to rain throughout that month, and harvesting operations were much delayed and the peasants experienced great difficulty in getting in their crops. Hailstorms which were frequent, especially in the southern districts, also caused considerable damage, and the losses figure up to a very large amount.

Winter sowings, on the whole, gave good results throughout ^{Winter} sowings.

the province, with the exception of the Novouzensk district. The best yield was obtained in the eastern part of the province, especially in the Bugulminsk district where the crop was excellent.

Spring sowings.

Wheat gave good results, and in the eastern districts an excellent crop was gathered. Oats and barley yielded fairly well, and, on the whole, came up to the average. The yield of peas and millet seed was less satisfactory, and on the whole it was below the average.

Seeds.

Linseed and hemp gave poor results notwithstanding the bright prospects during the spring.

Yield.

The average yield in this province may be taken as follows:—rye, 15 bushels; spring wheat, $11\frac{1}{2}$ bushels; barley, 10 bushels; and oats, 18 bushels per acre.

Ufa.

In Ufa the weather was very favourable for the crops up to the end of July, when north-easterly winds set in followed by sharp frosts, considerably damaging the standing crops. Millet seed suffered much and in many places was completely lost. During August it was very stormy with heavy rains, and harvest operations were consequently somewhat thrown back. Several heavy hailstorms passed over the province and the damage occasioned to the crops was considerable.

Winter sowings.

Rye which promised well early in the season fully came up to expectations, and gave good results especially in the southern districts of the province, where an excellent crop was gathered.

Spring sowings.

Wheat, on the whole, yielded slightly below the average. The best results were obtained in the Belebeer district, and the most unsatisfactory in the Menzelinsk district, where the crop, in many cases, was very bad. Oats yielded well and in many places excellent results were obtained, but barley, on the other hand, only gave an average yield. Peas also gave good results throughout the province, but millet seed did not come out so well.

Seeds.

Of hemp and linseed good crops were gathered, especially of the latter.

Yield.

The average yield in the province of Ufa per acre was as follows:—rye, 18 bushels; spring wheat, 11 bushels; barley, 12 bushels; and oats, 27 bushels.

Orenburg.

The weather in this province was very changeable, and, on the whole, unfavourable during the whole of the summer. Excessive heat suddenly gave way to cold weather, and on July 3 considerable damage was done to the crops by sharp frosts. Subsequently hot weather again set in, followed by heavy rains, which lasted up to the end of August.

Winter and spring sowings.
Seeds.

Rye and spring-sown grain gave good results, but hemp and linseed, on the contrary, gave very poor crops.

The average yield per acre was as follows :—rye, 18 bushels ; Yield. spring wheat, 18 bushels ; barley, 12 bushels ; and oats, 20 bushels.

Hay.

Taking the whole of this consular district, the hay crop may be said to have been a very satisfactory one, both as regards quantity and quality. An excellent crop of hay was gathered in the Don Cossack territory. In the remaining provinces, with the exception of Samara and Ufa, where it was slightly below the average, it was also fairly good.

Vegetables.

Generally speaking, the vegetables yielded well in this consular district. Bad reports were only received from Astrakhan, Samara, and Orenburg.

Potatoes were also satisfactory, and it was only in the province of Orenburg that the crop failed.

Fruits.

Owing to the severe winter and subsequent frosts early in the season, and even as late as June in the eastern provinces, the fruit came out very badly, and the quantity gathered was very small. The Kuban territory is the only province which shows an average yield.

Labour.

Taking it on the whole, labour was plentiful, and rates of hire were moderate. In several provinces the supply exceeded the demand, but in Ekaterinoslav, Stravropol, and Voronej a dearth of hands was noticeable, and wages in the last-named province ruled high.

KERTCH.

Winter wheat (azima) resulted in an average crop.

The crop of barley and oats proved to be good, being 20 per cent. above the average.

A small quantity of linseed was sown this year, and it produced an average crop.

Wheat
Barley and
oats.
Linseed.

BERDIANSK.

The year, taking it on the whole, has been a most unusual one in many respects. During the winter the steppes were covered with snow, thus protecting the sprouting seed from the severe frosts, and prospects of a most abundant crop were very bright. The spring was also fairly favourable until the end of April, when high winds were prevalent, threatening the misfortunes of the previous year, when a large tract of country was laid waste by the wind blowing the early sown seed out of the ground; but heavy rains setting in just saved this calamity--although some damage was done--and somewhat improved the outlook, and the prospects continued to be more or less bright as the season advanced. During May, June, and the first half of July, however, rain fell in abundance, followed by scorching heat, and the crops therefore did not come up to the anticipated standard, the harvest proving rather above the average, but the quality was bad.

The winter-sown grain (wheat and rye) gave good results, and the average yield throughout the district may be taken at 12 bushels to 15 bushels per acre.

Spring-sown grain (wheat, barley, and maize) suffered considerably from the high winds during the latter part of April and the frequent rains in spring and early summer, and the average yield of wheat was from 14 bushels to 16 bushels per acre; barley, 26 bushels to 30 bushels, and even as much as 40 bushels per acre in some districts. Maize yielded 24 bushels to 30 bushels per acre.

The quality of both winter and spring grain left much to be desired, and the prices during the whole campaign having ruled very low, the pecuniary result to the farmer, it is feared, will not be good, even with the abundance of grain; stocks are being held back in the hopes of better prices.

The present autumn has proved to be a very favourable one for the sowing operations, and rain having fallen frequently, the aspects of the sowings are very good throughout the district.

ROSTOV-ON-DON.

Winter sowings.

Winter sowings gave an abundant harvest in this district during the past year, but the quality of the grain was to a considerable extent found very poor, the development of the crops having been seriously affected, firstly, by the cold weather and several rather severe storms experienced during the month of April, and, secondly, by a period of drought, accompanied with hot dry winds during June. Rye, on the whole, was only slightly below the average as regards quality; but winter wheat was in most parts very light and without colour.

Spring sowings, notwithstanding the unfavourable weather Spring prevailing in the spring, gave a very good harvest—thanks to the sowings. beneficial effects of a good average rainfall during the months of May and June. The quality of the grain was likewise very satisfactory, barley being especially good.

Linseed proved a good harvest, being fully up to the average, Linseed. both as regards quality and quantity.

Hay, generally favoured by an increased rainfall, gave a very Hay. good harvest, the quality also being satisfactory.

Fruit was almost a failure, very little of it having withstood Fruit. the slight frosts that occurred in April.

Vegetables, on the whole, gave satisfactory results.

Vegetables.

There was a normal supply of hands during harvest time.

Labour.

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No. 1337.

DIPLOMATIC AND CONSULAR REPORTS ON TRADE
AND FINANCE.

RUSSIA.

REPORT FOR THE YEAR 1893

ON THE

TRADE, AGRICULTURE, &c., OF THE CONSULAR
DISTRICT OF RIGA.

REFERENCE TO PREVIOUS REPORT, Annual Series No. 1172.

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1263. Rio Grande do Sul	2d.	1324. Kiukiang	1d.
1264. Jeddah	1d.	1325. Resht	3d.
1265. Vienna	3d.	1326. Florence	1d.
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Reference to previous Report, Annual Series No. 1172

R U S S I A .

RIGA.

Consul Wagstaff to the Earl of Kimberley.

My Lord,

Riga, March 9, 1894

I HAVE the honour to transmit, herewith, my Report for the past year on the Trade and Navigation at Riga, together with the Reports from the Vice-Consuls at Libau, Pernau, and Windau. I have included a short notice on Agriculture, the details of which obtainable were too meagre for a separate Report.

I have, &c.

(Signed) WM. GEO. WAGSTAFF.

Report on the Trade, Navigation, and Agriculture of the Consular District of Riga for the Year 1893.

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Grain trade.

Unsatisfactory as the trade of Riga was in 1892, the past season has been worse. At one time it seemed as if the crops in both Germany and America would be poor ones, but very soon this proved to be incorrect, and the hopes that had been entertained for a brisk export trade vanished altogether on the outbreak of the Russo-German tariff war (July 19/31).

With the exception of oats, all cereals since then have met with no demand, and are difficult to sell. There are few signs visible of improvement; besides, the market is suffering through the influence of the extreme depression in America which checks all speculation. All hopes for the moment are centered on the commercial treaty under negotiation, as it is hoped that the definite settlement of same will improve the present condition of trade.

Agricultural
returns of
crops.
1893 crop
most
abundant.

The Central Statistical Bureau at St. Petersburg has not yet published the final returns of Russia's spring crops, therefore it is difficult to make comparisons with former years. However, one may safely assert that the crop of 1893 was one of the most abundant reaped in this country.

The yield of winter wheat is given at 12,500,000 quarters, against 11,000,000 quarters in 1892 (increase 1,500,000 quarters), whilst the rye returns were 88,500,000 quarters, against 73,000,000 quarters in the preceding year (increase 15,500,000 quarters); consequently the winter crops yielded 17,000,000 quarters over 1892.

Enormous as these figures appear, they are greatly surpassed by the estimated outturn of the spring crops, as will be seen by the following table, which shows, besides the last four years, the average crop for the 5 years 1883-87.

The returns of former years refer to the 50 governments of Russia and 10 provinces of Poland, as also do this year's returns of rye and azima wheat, which are complete, but all the other returns, marked with an asterisk, must not be considered as final, nor do they include the 10 provinces of Poland, of which no preliminary report has yet been issued.

Description.	Per Thousand Quarters.				Average per Annum.
	1893.	1892.	1891.	1890.	1883-87.
Azima wheat ..	12,450'	11,000	8,606	11,000	9,085
Spring „ ..	31,630*	21,152	13,297	16,980	21,502
Total wheat ..	44,080	32,152	21,903	27,980	30,587
Rye	88,709	72,954	60,744	81,290	79,720
Oats	79,686*	54,720	52,675	66,062	64,780
Maize	3,501*	2,646	3,557	2,930	2,773
Barley	26,690*	20,940	16,913	19,601	17,450
Buckwheat ..	7,168*	6,050	5,432	5,976	7,227
Milletseed ..	7,983*	7,264	4,458	6,626	6,242
Peas	2,092*	2,615	1,963	2,505	1,721
Total	259,909	199,341	167,645	212,970	210,500

Thus, admitting the above returns to be correct, the total yield of the 1893 crop is about 60,000,000 quarters larger than that of 1892, and about 49,000,000 quarters above the 5 years' average 1883-87. Adding the spring crops in the 10 provinces of Poland, the result will be still more favourable.

Amongst the different cereals, oats gave a most prolific crop, exceeding the return of 1892 by about 45 per cent.; maize comes next, 36 per cent.; barley, 28 per cent.; and rye 22 per cent. increase over the crops of 1892.

It might seem strange that with such an abundant harvest very little of it has, as yet, been brought to market; also that prices in the interior, oats and barley excepted, are still kept on a level much above the quotations in foreign grain markets. The explanation of this is, that the Russian Government has artificially kept grain back by placing cheap money at the disposal of the banks for the purpose of granting loans on cereals; the farmers being buoyed up with hopes that better prices may rule on the termination of the tariff war. It remains, however, to be seen whether this measure may not ultimately prove disastrous to both banks and farmers.

Annex B shows that the total quantity of cereals shipped from this port in 1893 amounted to 992,481 quarters, against 683,126 quarters in 1892, and 1,305,016 quarters in 1891. Thus the quantity exported was about 45 per cent. above that of 1892.

Oats took the lead, and show an increase of about 58 per cent. This article was shipped principally to France and England.

Rye rose from 8,120 quarters in 1892 to 23,522 quarters in 1893, yet this is a very small quantity considering that the export from Riga during the 10 years, 1881-90 was about 300,000 quarters annually.

The barley shipments at this port have receded from 99,148 (1700)

quarters in 1892 to 93,759 quarters. This is accounted for by the bad condition of the Courland crop, which made it unfit for exportation.

Linseed.

Sowing linseed has risen by 36 per cent., viz., from 101,889 bags and barrels in 1892 to 138,674 bags and barrels, but on the other hand crushing linseed fell off by 28 per cent., being only 96,446 quarters, against 134,867 quarters in 1892.

Principal

cereals
exported from
1866 to 1890

To convey a more concise idea of the grain trade of this port, I append a table showing the quantity of the principal cereals exported during the past 25 years (1866 to 1890 inclusive) divided into quinquennial averages.

For much of the data contained in this report I am indebted to the statistical section of the Riga Exchange Committee and to other firms who have obligingly furnished me with details of the trade in which they are specially interested.

Years.			Quantity.			
			Rye.	Barley.	Oats.	Wheat.
			Quarters.	Quarters.	Quarters.	Quarters.
1866-70..	..	..	18,820	60,238	270,815	11
1871-75..	..	..	265,380	91,429	666,760	8,370
1876-80..	..	..	607,764	187,477	1,109,160	43,899
1881-85..	..	..	279,174	280,965	798,515	25,942
1886-90..	..	..	359,200	239,783	839,800	80,471

Stocks, grain
and seed.

The stocks of grain and seed at present in store at Riga are not large: they are estimated as follows: -Wheat, 3,000 tons; rye, 15,000 tons; oats, 23,000 tons; barley, 2,500 tons; linseed, 2,600 tons; and hempseed, 300 tons.

Flax.

In last year's report I referred to the rise in flax, and stated that spinners would probably have to pay higher prices. The blank sales made here in October, 1892, were based on the belief that trade being bad abroad and the Russian crop being a good one, prices would open low, though the fact that spinners had allowed their stocks to run unusually low was lost sight of, and that the demand would exceed the supply, which proved to be the case; prices rose accordingly, but the demand slackened in March. In the month of May, however, the reports as to the unhealthy state of the crops in France and Belgium induced spinners to re-enter the market forcing prices up, yet it was a dragging trade till August, when some of the dealers cleared out their stocks at 22*l.* 10*s.* to 24*l.* for "K," c.i.f., ordinary quality. In September, spinners again bought a quantity of flax from traders who had held out for 25*l.*, c.i.f., for ordinary, and in October the Riga flax of the 1892 crop had practically been bought up.

Flax crop
over-
estimated.

The flax crop of 1893 was estimated to be much larger in quantity and superior in quality to that of the preceding year.

The returns, however, appear to have been very unequal. From this province (Livonia) and Pskoff the quantity does not much exceed last year's; the Livonian quality was exceptionally good, but in Courland, Lithuania, and many districts in Witebsk the quantity was less and the quality inferior to the 1892 crop.

Livonian
quality
excellent.

Before the 1893 crop was even pulled, I hear that some speculators again pursued the same tactics as in the previous year and sold a quantity of fresh flax at about 23*l.* 10*s.* for ordinary, 25*l.* for better districts. Thereupon, they issued circulars advising putting off making purchases as flax would be cheaper later on; notwithstanding, the French spinners began to buy largely, and Ireland following their example (also Belgium to some extent, but Scotland less in proportion) drove prices here up to 26*l.* 10*s.* to 27*l.* for ordinary, 30*l.* to 31*l.* for better districts. The Opotchka "Puick" reached 57 r. the berkovetz, about 38*l.* per ton. In spite of the bad roads, an unusually large quantity, about 16,000 tons, was shipped in the month of December.

The quantity remaining in the hands of the peasants of last year's crop is estimated at about 30 per cent., and that in the hands of exporters ready for shipment about 8,000 tons.

Flax
remaining in
hands of
peasants, and
quantity
ready for
shipment.
Average prices
of flax.
Results of bad
system of
selling in
blank.

The average price of flax last year, taking "K" as a basis, was about 27*l.* per ton, c.i.f. The evil of this system of selling in blank is that, if the crop is any way late, buyers have to cover their sales at times when the peasant has only a trifling quantity of flax ready, and seeing there are eager buyers he prepares his crop less carefully, and at the same time asks a higher price for it. This is no doubt the result of excessive competition, and the consequence is the lowering of the brack which when once established at the beginning of the season is very difficult to alter. I have alluded to this pernicious lowering of the standard quality of flax in former reports.

The quantity of flax shipped at Riga last year was 59,667 tons against 46,300 tons in the previous year, and 16,630 tons in 1891. The increase of 13,367 tons and the enhanced prices of flax largely contributed in swelling the total value of exports.

Quantity of
flax shipped.

The hemp crop of 1893 was expected to have been a large one, but in the Polish districts it suffered much from continuous rain and has partly lost its soft oily nature. Some districts yielded good quality, but in others the result was most unsatisfactory. It is now stated that the winter dried quality of 1893 is lower and less in quantity than that of 1892. It appears that the rain also affected the hemp crop in the Ukraine, but to what extent is not known. Prices ruled somewhat low until October, when the old stocks gave out and little new hemp had been placed upon the market. The principal market for this fibre is at Briansk from October 8 to 10 (o.s.). About 5,000 tons (although 7,000 tons were expected) of the 1890, 1891 and 1892 crops were offered for sale, but only about one-half was disposed of. The market was less brisk than anticipated, and

Hemp crop,
partly
damaged
through rain.

prices which had stiffened gradually gave way, but regained their upward tendency on it becoming known that the Italian crop was only $7\frac{1}{2}$ per cent. over the returns in 1892; the demand became more active, and a great deal of hemp was bought up for Königsberg though many buyers held off in the hope of a fall in prices in which, it appears, they have been disappointed.

Quantity of hemp shipped. The quantity of hemp exported from Riga last year was 7,583 tons against 6,179 tons in the previous year; increase, 1,404 tons, but a decrease of 3,379 tons compared with 1891.

Average price of hemp. The prices ranged between 24*l.* 10*s.* and 30*l.* 10*s.*, c.i.f., according to quality.

Timber. The timber trade in general last year turned out contrary to the expectations of shippers. At the beginning of the season a fairly brisk business was done at satisfactory prices, but this only lasted a short time, the demand ceased, and prices gradually gave way. On the whole, the result of the year's trade was unfavourable.

Sawn wood. The supply of sawn logs floated to Riga in 1893 was somewhat in excess of that of the two previous years. Prices also ruled lower until the month of July, when a recovery set in, due to the fact that the quantity proved to have been over-estimated.

The coal strike in England reacted adversely on the prices and consumption of wood goods, while the tariff war curtailed the late summer and autumn sales to Germany. The rise in the value of the rouble was also against exporters.

Owing to the present mild winter the navigation of this port has remained open, and several of the small holders of sawn goods have continued to ship, preferring to accept a lower price than incur the costly process of mortgaging their goods to the banks. These transactions have not only impeded the recovery of prices on the other side, but have reduced the quantity of goods for "first open water" shipment.

Stocks of sawn goods. The stocks at Riga are not large, and in view of the little snow in the forests this winter, which may possibly cause a deficiency of logs in the spring, together with the enhanced value of the rouble, the prices of goods for delivery have risen rapidly.

Sleepers. There was a considerable falling-off in the number of sleepers shipped last season, 1,584,719 square and 36,725 round, total 1,621,444, against 2,000,560 in the previous year, or a decrease of 379,116.

Of the more valuable classes of goods, less was shipped, viz., masts and boat's-masts 9,000 pieces, round timber 100,000 pieces, and sleepers as stated above.

Quantity of wood shipped. The estimated quantity of timber exported from Riga last year is 34,500,000 cubic feet, against 38,200,000 cubic feet in 1892, or a decline of 3,700,000 cubic feet.

Value of wood exported. The value of all kinds of wood exported in 1893 amounted to 1,067,407*l.*, being 114,376*l.* under 1892.

The total quantity of timber shipped at Riga during the past five years was as follows:—1889, 44,000,000 cubic feet; 1890, 36,300,000; 1891, 40,600,000; 1892, 38,200,000; and 1893, 34,500,000. Quantity of timber exported in 1889 to 1893.

There is an increase to be noted in oilcake of about 9,000 tons compared with last year (29,470 tons, against 20,456 tons in 1892). Oil-cakes.

There is also a slight advance in the quantity of eggs exported of 1,208 tons—8,316 tons, against 7,108 tons in the preceding year. No change has taken place in this branch. A larger export to England was anticipated, but the coal strike affected the trade, the miners being large consumers of eggs. Eggs.

A new article has been added to the list of exports last year, viz., hay. Trial shipments have been made in former years, but the quantities were too insignificant to be classed amongst the exports. The quantity shipped of steam-pressed bales amounted to 2,438 tons, most of which was contracted for in June and July last, when a dearth of fodder was anticipated in England and Germany. The highest quotation for hay was about 6*l.* 17*s.* c.i.f. United Kingdom; and the present price is about 5*l.* 5*s.* Hay, new article of export.

The total value of exports from Riga for the year 1893 amounted to 4,843,824*l.*, being an advance of 800,500*l.* over 1892, or about 20 per cent. Not only was there an increase in the quantity of produce but also in the values of the principal articles exported. In Annex E I have given the quantity of the principal articles of export from Riga in the past five years. Total value of exports.

The principal articles imported during the past year are given in Annex C; the total value of same was 2,559,206*l.*, against 1,960,190*l.* in 1892. Imports, value of.

Taking the total value of exports and imports during the past year, as shown in Annex D, amounting to 7,403,030*l.*, it will be seen that the volume of trade at this port has increased by 1,399,516*l.*, or 23 per cent. compared with 1892. Seaborne trade, total value of.

TABLE showing the Values* of Exports and Imports at Riga during the past 25 Years, 1866–90, Divided into Quinquennial Periods.

Years.	Value.	
	Exports.	Imports.
	£	£
1866–70	4,001,468	1,861,319
1871–75	5,119,949	3,068,409
1876–80	5,894,748	3,496,897
1881–85	5,765,205	2,799,761
1886–90	5,348,570	2,128,815
Average per annum	5,225,988	2,671,040

* The disparity in the values compared with the consular returns arises through the different rates of exchange used in converting roubles into *l.* sterling.

Russo-German
tariff war—
effect of on
trade at Riga.

It was feared that the Russo-German tariff war would act prejudicially on the trade of this port. This has not proved to be the case; the value of imports has risen by 599,016*fr.*, or 23 per cent. The usual channels of trade were simply diverted in other directions, Great Britain, France, and Belgium being the principal gainers thereby. On several occasions importers applied to this Consulate for the address of manufacturers in England of goods which they had hitherto received from Germany, and there is no doubt that the relations established will henceforth affect German exports to Russia.

Enormous
reduction of
German
exports to
Russia.

To illustrate the enormous effect of the tariff war on German exports to Russia, I append a comparative statement, compiled from official tables, published at Berlin. The quantities are given in 100 kilos. (220 lbs.).

Articles.	1891	1892.	1893.	
			January 1 to July 31.	August 1 to December 31.
Cotton and cotton goods	50,020	40,471	18,284	4,988
Iron and steel manu- factures	571,923	521,558	543,781	130,190
Chemicals and colours	327,203	355,644	157,924	68,500
Coal and coke	2,294,563	2,321,576	1,429,768	929,806
Wool and woollen goods	34,322	29,431	32,185	9,021
Drugs and groceries ..	203,242	357,177	350,908	229,252
Machinery, &c... ..	130,942	126,304	86,790	43,782
Agricultural produce ..	73,147	99,160	55,030	17,447
Hides and skins	64,024	47,816	30,684	27,319
Leather and leather goods	3,578	2,603	1,534	517
Linen yarn and goods ..	2,414	1,945	1,049	364

One noticeable feature connected with the tariff war is the impetus it has given to local industries. Large quantities of raw stuff and half-manufactured goods were directly imported; also a great deal of machinery and ironmongery of all kinds from England, but the concessions in the tariff just concluded, however much Russian manufacturers may complain, will confer immense benefit on the agricultural and other interests of the country through the cheapening of many articles which the protective system placed beyond the reach of the most important classes of the nation.

Riga, with its various industries, will suffer less in proportion than Moscow, Lodz, Warsaw, &c., yet there is no doubt that the effect of the commercial treaty with Germany will prove detrimental to certain industrial branches, especially on spun wool and woollen manufactured goods, chemicals, leather, and agricultural machinery.

The position of manufacturers of these goods as regards orders will be affected as soon as the new tariff is in force. In

fact, many merchants are already holding aloof, and some remain entirely out of the market, preferring to await the new treaty.

One thing must not be overlooked, the reduced duties on raw materials will partly compensate local industries for the low tariff on many articles, and manufacturers here appear resigned to the proposed reductions, and to be content with smaller profits in future.

The tendency of the markets in Russia for certain goods is lower, and many productions are easier to purchase. It is even reported that where contracts are late in execution the orders have been withdrawn, and instructions have also been given to try and cancel other contracts.

Seeing that Great Britain, under the "most favoured nation" clause, will also reap the advantages of the Russo-German commercial treaty, it behoves British manufacturers to profit by the lessons learnt during the late depression of trade, and take a leaf out of the German manufacturer's mode of conducting business abroad. I am told by a firm having extended relations that several hundred German commercial travellers of every description have already arrived in Russia, and are booking orders. They are again first in the field. These men are specially educated, are more expert and persevering, besides they have long established relations with their own countrymen in Russia, which accounts in a great measure for their success. There are also several Austrian commercial travellers, but few English.

British manufacturers' opportunity of regaining part of lost trade in Russia.

I think it a fitting moment to give here an extract from my reply to a letter asking an expression of my opinion as to the value of a catalogue sent to me of British manufactures:—

"The book is a dead letter, and will remain in the Consulate for ages without anybody coming to consult it. My outer office table is covered with circulars and illustrated catalogues which are from time to time distributed amongst traders. The 'Iron-monger' is sent to me weekly, and contains similar advertisements as N.N. The only book occasionally consulted is 'Kelly's Directory.' Another drawback is it is published in English, but I may say that advertisements in any form cannot possibly serve the interests of British manufacturers in the same manner as a commercial traveller would. Importers must be periodically visited by men speaking their language, and who are posted up-to-date, including tariffs, exchanges, freights, &c. In fine, if British manufacturers wish to retain their hold on markets, or secure new ones, they must renounce their old conservatism, and yield to the exigencies of any particular trade. When this is done we shall probably no longer see the shops in Russia stocked with cheap German goods."

Absolute necessity of employing English commercial travellers. Catalogues comparatively are useless.

"For many years I have pointed out this in my reports, and could cite several instances where British manufacturers have been blind to their own interests."

"In conclusion, I must say that whilst H.M.'s Consuls are ever ready to assist in developing British trade, their scope of usefulness is naturally limited, and, therefore, it principally depends upon the initiative and energy of the individual manufacturer or his representative specialist in every branch, to find new markets and push the sale of his wares."

Exchange.

The rate of exchange has been fairly steady during the past year. The improvement that set in in January continued, with slight variations, until the end of the year, the highest quotations being 9 r. 90 c., and the lowest 9 r. 31 c. in December. The average rate for 3 months' bills during 1893 was 9 r. 54 c. per 1*l.* sterling, but in calculating the annexed returns 10 r. has been used as in preceding years.

Claims
against
residents.

I regret that I should again have to recur to the subject of claims of British commercial houses against a certain class of local traders. In spite of warnings, business relations have been renewed with parties who have repeatedly failed in their engagements. Instead of settling outstanding claims, as they are led to believe, by a fresh transaction, they only add to their losses. In some instances this Consulate was successful last year in settling claims, but the difficulty in substantiating same in this country is great, and the fear of throwing good money after bad often deters parties from taking legal proceedings against debtors.

Russian
passport
regulations—
Warning to
British
travellers.

Cases frequently occur where British subjects have been seriously inconvenienced through ignorance of the Russian passport regulations. Travellers who have previously visited Russia arrived at Riga purposing to continue forthwith their journey abroad. The authorities, however, refuse to grant the necessary visé on account of the person having enjoyed on a former occasion the right of residence for six months on his national passport. Travellers have, therefore, to take out a Russian passport to enable them to cross the frontier, and this entails delay and expense, &c. To avoid this, I would suggest that they would provide themselves with a fresh national passport each time they enter this country.

Navigation,
débâcle.

The débâcle in the River Dūna took place on April 5, but owing to the passage at Domesness being completely blocked no vessel could enter the bay.

Bay of Riga
completely
frozen over.

Such an event as the entire Bay of Riga being thickly frozen over has not happened since the year 1843, and only once before in this century, viz., in 1829. On both occasions serious inundations took place at Riga.

The storm of January 31, 1893, formed a belt of icebergs on the bar in the shape of a half-moon, four-fifths of a mile long and 35 feet high. On March 27, preparations commenced, channels or trenches were cut in the ice, and, later on, dynamite and powder used to pierce the solid barrier which had reached the bottom. Thanks to these measures and the combined efforts of the ice breakers the mass of ice broke through on the

morning of April 10 and thus averted an inundation which, at one moment, seemed imminent.

The three ice-bound steamers alluded to in last year's report got free on April 27, 29 and 30; the "Silvio" was de-^{Freeing of ice-bound steamers.}tained 111 days; "Loch Leven," 113 days; and the "Penelope," 114 days.

The navigation of this port opened on May 2 by the arrival of the British Steamship "Frankfort," though "first open^{Official opening of navigation.} water" was only declared by the Board of Commerce on May 9. Several of the first steamers suffered damage to their bows through contact with ice.

The shipping trade was anything but brisk throughout the season.

By Annex A. it will be seen that British shipping recovered^{British shipping.} last year some of its lost importance at this port, but this was owing to the increased tonnage dues levied on German vessels. The total number of arrivals being 404 (7 sailers and 307 steamers) of 348,734 tons, against 380 of 315,882 tons in the preceding year; the average for the past 5 years is 453 vessels gauging 362,160 tons, which shows that larger sized vessels are now employed in the Baltic trade.

Of the number entered, 125 were with cargoes from Great Britain, 4 with salt from the Crimea, and 1 sailing vessel with salt and clay from Harburg; the remainder were in ballast. Of the number cleared, 299 were bound with cargoes to Great Britain, 102 to other countries, principally France, Belgium, and Holland, and 3 in ballast.

The same Annex A. shows the number of foreign vessels^{Foreign shipping.} entered at this port last season, as 1,205 of 499,916 tons or a further decrease of 71 vessels and 60,378 tons. The German^{Decrease in German vessels owing to tariff war.} flag on account of the tariff war showed the greatest falling off, 27 per cent.

The decrease would have been larger had not many German vessels been obliged to come here to fulfil charters accepted before the tariff war was declared. Again, the German weekly boats to Lübeck and Stettin continued to run (which must have sensibly reduced their dividends last year) in order to keep this trade in their hands. Danish shipping also fell off by 11 per cent.; on the other hand, Swedish and Norwegian vessels increased over 10 per cent.

The gross total tonnage of British and foreign shipping^{Total tonnage.} entered at Riga in 1892 was 848,650 tons. British vessels occupying 41 per cent.; Russian, 18 per cent.; German, 16 per cent.; Danish, 14 per cent.; Swedish and Norwegian, 8 per cent.; Dutch, 2 per cent.; and other countries 1 per cent. respectively of the carrying trade of this port.

It is gratifying to report that last year there were no im-^{Casualties.}portant casualties to British shipping in this consular district. On January 17, 1894, however, the "Vernon" was stranded off Bernathen, about 8 miles south of Libau, and eventually became a total wreck. It was in the same locality that the "Ferrara"

RUSSIA.

struck in 1891. Complaints are even made in Russian newspapers regarding the insufficient survey made of that part of the Baltic, and they urge the placing of beacons and warning signals to ensure safe navigation. It behoves, therefore, the masters of vessels bound to Libau to take special precautions on nearing the coast particularly in hazy weather. Mr. Hill, in his report, likewise calls attention to this matter.

Freights.

Freights for "first open water" ruled exceedingly low, and the following may be quoted as the current rates at that time:—London and East Coast, 10½d.; Continent, 10½d. to 1s. per 320 lbs. oats; flax, East Coast, 14s. 6d. to 15s.; Continent, 16 fr. to 18 fr. per ton; deals, East Coast, 19s. 6d. to 1l.; Antwerp, Ghent, 25 fr. per standard. Owing to the almost simultaneous opening of all the Baltic ports, tonnage became somewhat scarcer towards the end of May and rates stiffened, but the stocks of grain being small, the amount of business done was so limited that they soon receded to their former level.

The withdrawal of German tonnage from Russian ports caused an advance in freight in August, though only for special cargoes such as timber for Dutch ports, of which trade small sized German boats have for years almost had the monopoly. Contrary to all expectation the stoppage of German tonnage did not so largely affect the freight market, as it was more than counterbalanced by the absence of goods for shipment to Germany, and British steamers promptly replaced the German vessels.

Upon the appearance of the new crops a firmer tendency was apparent, yet tonnage was less pressed upon the market than is usually the case at that season. Freights in consequence ruled firm, and from the middle of September the following were current rates:—London, East Coast, 1s. 3d.; Continent, 1s. 4½d.; oats, per quarter, East Coast, 1l. 5s. to 1l. 6s.; deals, Antwerp, 30 fr. to 32 fr.; Rouen, 35 fr.; Bordeaux, 40 fr. per standard. These quotations further improved towards the end of the year when flax shipments commenced, and the fear of the navigation closing suddenly, made shippers anxious to get their goods away; East Coast, 1l. 2s. 6d. per ton; Belfast, 1l. 7s. 6d. per ton was paid for several steamers; but as soon as milder weather set in again and it became apparent that the navigation would probably remain open, shippers only offered East Coast, 1l. per ton; Belfast, 1l. 5s. per ton; and these with 24 fr. to 25 fr. flax per ton for Ghent and Dunkirk have remained the current rates for the winter season.

Shipping prospects.

The prospects for the coming season are as yet very doubtful; very few sales of grain and wood have taken place, and large quantities of flax have already been shipped so that the volume of trade during the first part of the season cannot be large.

Agriculture, Courland.

The following details on agriculture have been collected from official reports:—

In consequence of hot dry weather in the month of June,

the crops, especially spring sown, somewhat suffered, but with the rain in July they soon recovered. The heat lasted up to early in August when cold rainy weather set in, thereby preventing the getting in of the crops and, at the same time, the sowing of winter wheat.

The rains were so heavy in the province of Courland that the harvest was not gathered until September, and in consequence the wheat had commenced to sprout in the ear in several localities. Damage to crops through rain.

The crops of winter grain, on the whole, were normal. Of the spring crops, oats yielded under the average, but in some districts of Courland the result was most unsatisfactory. Barley gave good returns, except in Courland where it was under average. Peas which form an important item in the food of the local population, yielded well in Livonia, but indifferently in Courland. Flax gave good results in Livonia, especially the early sowings (the later sowings only gave middling returns), though in Courland the crop was normal. Spring-sown crops.

The potato crop, on the whole, was satisfactory in Livonia; only in some places the August rains causing rot. In Courland the yield was bad on account of the sodden state of the ground. Potatoes.

Of fruit, apples gave an abundant return in both Livonia and Courland. Pears, plums, and cherries were very scarce, as a large number of trees perished through the severe frosts of last winter. Berries were plentiful in Livonia, and vegetable produce gave satisfactory results. Fruit.

The hay crop in Livonia was about the average and of good quality, it having been gathered before the rains set in. In Courland, however, it was either under average or unsatisfactory. Hay.

The harvest returns for the provinces of Livonia and Courland in 1893, was as follows:—

Articles.	Quantity.	
	Livonia.	Courland.
	Quarters.	Quarters.
Rye	766,800	745,500
Wheat	40,320	84,960
Oats	716,100	480,200
Barley	768,240	458,640
Peas	66,240	41,760
Total	2,357,700	1,811,060
Grand total	4,168,760	

These provinces have been comparatively free from cattle plague during the past year, only a few isolated cases of foot-and-mouth disease, anthrax, and glanders having appeared. Cattle plague.

Emigration.

The removal to the pale of settlement of the Jews who are disqualified from residing in the province, viz., those who have taken up their residence here before the issue of the Ministerial Circular of April 3/15, 1880, No. 30, was not carried out; the term granted to them having been extended to June 1/13, 1895. As anticipated, the tide of Jewish emigration has been strong throughout the past season. From Riga about 325 persons left for Lübeck, 150 via Stockholm, and about 80 to the United Kingdom; the latter partly bound to America.

From Libau 5,000 to 6,000 souls left for continental ports en route for the United States of America and Africa. Of this number, 700 to 800 souls were German colonists from the Volga. About 185 Jews sailed from Libau direct to the United Kingdom, mostly to join their relatives.

It is difficult to ascertain which are destitute: the emigrants possessed a certain amount of money, besides most of them were provided with American prepaid tickets.

As in former years warning notices were published throughout this consular district regarding the little chance emigrants would have of gaining a livelihood in the United Kingdom.

Public works.
Niemen-
Windau
Canal.

Another result of the Russo-German tariff war has been to revive the question of diverting the channel of the Niemen and connecting it with the Windau, so that its outlet should be in Russian territory. This high waterway running through western Russia conveys a considerable quantity of produce annually to German ports—Tilsit, Memel, &c., whence it is shipped to foreign countries.

In October last, about 700,000 tons of goods were floated down the Niemen, and the question naturally arose how would Germany treat these goods in the event of an unsatisfactory settlement of the tariff question. The advantages of Windau, which could be made a first class port, were dwelt upon, and the cost of the canal, about 70 miles in length, is estimated at 4,000,000 r.

Railways.

A change in the administration of railways is to be noted; the different lines converging on Riga are now worked by the Government: Orel-Vitebsk (Dvinsk-Vitebsk has not yet been finally handed over), Riga-Dvinsk (comprising Riga-Bolderaa and Riga-Mühlgraben) and Riga-Mitau.

The question of extending the line from Tuckum to Windau remains in abeyance.

Public health.
Leprosy

Most praiseworthy efforts continue to be taken to prevent the spread of leprosy. There are two asylums for these unfortunate persons in this province: one at Muli and the second at Nenai. A third is contemplated and the necessary land has been allotted by the Livonian nobles. Last year there were 19 patients at Muli and 41 at Nenai. The number of beds in the latter asylum has been increased to 80; thus, there is now accommodation for 100 patients, the annual cost for each being about 10*l*. Although there is not sufficient space for housing the large number of lepers in the Baltic provinces, the isolation of a portion is a great step in advance and of

immense importance in battling against the spreading of this dire malady.

The cholera again made its appearance at Riga on October 5/17 last, and was officially declared on October 12/24, from which date daily bulletins were issued. Cholera.

The last choleraic attack at Riga was on November 12/24. In all there were 53 cases, of which 21 proved fatal; the numbers last year being 151 and 75 respectively.

The character of the disease was not of such a malignant type as last year: it made its appearance a month later and only lasted 39 days. The persons attacked were mostly from the same localities and of the same classes as those last year, viz.: labourers at the port and on board ships, and men engaged on the river, who, regardless of the notice published by the sanitary authorities, prefer to drink unboiled river water.

Since the building of the training walls and groynes in the Düna the current has been cut off at certain points, and it is feared that these quasi-stagnant places behind the dams will always prove a hot-bed for the dissemination of diseases.

The authorities renewed their energetic measures, and the experience gained last year enabled them to cope successfully with the epidemic. Several artesian wells have been sunk and were placed at the disposal of the inhabitants.

Regarding cholera, the following statistics have been published by the medical department. Cholera statistics

The epidemic in 1893 was far from being so severe in Russia as in the year preceding, both as regards the number of persons attacked and rate of mortality.

In 1892, from the month of May up to September, there were 433,643 choleraic cases, whilst in 1893, from January to September, there were only 62,107 attacks. The number of fatal cases during the periods abovementioned in 1892 was 215,157, and in 1893 only 24,284 deaths.

Last year, up to September, the province of Podolia furnished the largest number of cases—15,679, of which 5,252 were fatal. Orel came next with 4,922 cases and 1,802 deaths; then Kursk, 3,229 attacks and 1,240 deaths; and the Don Cossack territory, 2,625 attacks and 1,262 fatal cases. The rate of mortality in 1892 was 49·6 per cent., which lowered to 39·1 in 1893.

The department considers this fact most satisfactory, as, according to the ordinary course of cholera epidemics, they generally become more widespread in the second year after their appearance.

Influenza still reigns, though of a mild type, otherwise the public health in these provinces has been good during the past year.

Annex A.—RETURN of all Shipping at the Port of Riga during the Year 1893.

ENTERED.

Nationality.	Sailing.		Steam.		Total.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.
British	7	1,328	397	347,506	404	348,834
Russian*	214	66,878	269	94,582	483	161,460
German	79	17,824	185	114,730	264	132,554
Danish	58	7,448	161	116,388	219	123,836
Swedish and Norwegian	95	23,662	130	42,232	225	65,894
Dutch	30	9,564	13	9,640	43	19,204
Other countries ...	5	1,360	7	6,218	12	7,578
Total	487	117,354	1,122	731,296	1,609	848,650
.. for the year preceding ...	471	115,767	1,188	760,690	1,659	876,456

CLEARED.

Nationality.	Sailing.		Steam.		Total.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.
British	7	1,328	397	347,506	404	348,834
Russian*	225	69,850	250	94,582	474	164,432
German	79	17,824	185	114,730	264	132,554
Danish	58	7,448	161	116,388	219	123,836
Swedish and Norwegian	95	23,662	130	42,232	225	65,894
Dutch	30	9,564	13	9,640	43	19,204
Other countries ...	5	1,360	7	6,218	12	7,578
Total	499	120,326	1,122	731,296	1,621	851,622
.. for the year preceding ...	469	115,257	1,187	760,849	1,656	876,106

* Vessels engaged in the coasting trade are included.

Annex B.—RETURN of Principal Articles of Export from Riga during the Years 1893–92.

Articles.		1893.		1892.	
		Quantity.	Value.	Quantity.	Value.
			£		£
Cereals—					
Oats	Quarters	858,919	662,188	541,532	371,241
Rye		23,892	26,396	8,126	18,393
Barley		98,739	96,505	99,148	102,668
Wheat		16,281	72,028	34,326	60,666
Total...		997,831	...	683,126	...
Peas and beans, &c.		14,687	18,667	17,464	14,918
Crushing linseed		36,146	205,718	134,265	236,329
Hempseed		17,851	25,582	11,346	15,802
Sesamee, crushed		Barrels	138,674	111,546	161,868
Onions and horsehair		Tons	8	3,776	364
Eggs			8,316	288,247	7,108
Lock			56,667	1,261,442	46,366
Hay			2,446	9,215	19
Hemp			7,553	268,336	6,779
Ginseng			4,663	62,614	8,715
Onions			29,476	264,236	26,476
Skins and hides			1,439	187,736	3,154
Wool			64	6,366	500
Wood of all kinds		Cubic feet	34,569,600	1,095,407	38,206,000
Other articles			...	127,178	...
Grand total		...	4,848,824	...	4,643,324

Annex C.—RETURN of Principal Articles of Import to Riga
during the Years 1893-92.

Articles.			1893.		1892.	
			Quantity.	Value.	Quantity.	Value.
				£		£
Chemical produce...	Tons	...	1,418	62,581	1,893	62,531
Clay...	"	...	15,013	37,835	12,456	37,835
Coals...	"	...	182,137	160,644	173,952	160,644
Cocoanuts, coprah	"	...	2,875	54,328	2,522	54,328
Coffee	"	...	392	59,215	345	59,215
Corkwood	"	...	3,427	118,746	3,460	118,746
Cotton	"	...	3,656	287,650	1,863	287,650
" manufacture	"	...	8	4,900	52	4,900
" yarn	"	...	80	10,122	82	10,122
Dyewood	"	...	11,840	89,514	8,415	66,255
Herrings	"	...	125,357	188,035	99,346	139,085
Hides	"	...	550	39,380	325	27,363
Hops	"	...	5	1,296	47	13,275
Iron—						
Pig	"	...	5,729	81,197	4,825	68,380
Cast	"	...	8,177	51,517	3,702	23,322
Machinery	"	...	6,143	190,900	3,833	118,943
Manure	"	...	22,541	85,206	20,955	79,210
Metal ore	"	...	5,570	87,725	4,187	65,943
Oil	"	...	285	17,533	235	14,840
Paints	"	...	2,579	129,968	322	16,246
Resin...	"	...	3,253	26,644	3,228	26,437
Spices	"	...	146	14,726	170	17,144
Steel	"	...	5,754	217,490	2,413	91,387
Sulphate of soda	"	...	2,925	41,464	2,324	32,942
Sulphur	"	...	1,927	12,140	2,181	13,743
Tools...	"	...	215	17,577	210	17,220
Wine	"	...	693	65,644	490	55,623
Woollen manufacture	"	...	45	34,750	39	30,337
" yarn	"	...	61	23,046	44	16,482
Other articles	"	...	...	344,483	...	395,010
Total...			...	2,559,206	...	1,960,190

Annex D.—TABLE showing the Total Value of all Articles
Exported from and Imported to Riga from and to Foreign
Countries during the Years 1893-92.

Country.	Exports.		Imports.	
	1893.	1892.	1893.	1892.
	£	£	£	£
Great Britain	..	2,078,493	..	761,225
Germany	..	549,179	..	682,626
Denmark	..	61,844	..	38,356
Holland	..	297,400	..	9,936
Belgium	..	555,478	..	155,600
Sweden and Norway ..	..	96,936	..	141,857
France	..	387,123	..	9,843
Other countries	..	16,871	..	160,747
Total	4,843,824	4,043,324	2,559,206	1,960,190

Annex E.—TABLE showing Quantities of Principal Articles of Export from Riga in the past Five Years.

Articles		1889.	1890.	1891.	1892.	1893.
Flax and codlin	Tons	42,524	62,430	43,337	16,800	59,667
Hemp and codlin	"	12,700	16,131	10,662	6,774	7,383
Wheat	Quarters	81,746	108,667	291,666	344,926	16,261
Rye	"	917,920	375,386	469,676	5,329	22,722
Barley	"	568,440	298,256	148,680	99,148	93,779
Oats	"	821,142	539,866	326,560	541,532	866,919
Sowing linseed	Barrels	129,151	109,300	121,530	191,889	288,974
Crushing linseed	Quarters	366,360	637,680	232,617	134,867	96,446
Hempseed	"	51,612	29,148	27,846	11,646	17,861
Onionseed	"	17,100	21,672	29,240	23,496	29,470
Eggs	"	5,306	6,200	9,676	7,138	8,336
Timber	Cubic feet	44,000,000	36,600,000	40,608,000	28,200,000	34,500,000

LIBAU.

Mr. Vice-Consul Hill reports as follows:—

Trade.

The report on the trade of Libau for the past 12 months cannot, unfortunately, be classified as showing very much improvement on its predecessor; in fact, it has been 12 months of disappointed hopes and expectations owing partly to the tariff war between this country and Germany. Russia also imposed such heavy dues on German shipping as to render it almost impossible for vessels of that nationality to come to this port for cargo. This step has, of course, been taken advantage of by those countries which, although not possessing so large a number of steam vessels as Germany, still own a good many of the same class. Formerly, only very few Swedish vessels of small tonnage came to Libau for cargoes of rye, &c., for the mother country, whereas during the past year large steamers of 800 to 1,000 tons register and upwards have found their way hither; and, having done so, it will be interesting to see whether they can maintain the position they have acquired in the trade, which hitherto has been carried on by British, Danish, and German vessels. Last year many more Danish steamers than usual were engaged in the trade.

Shipping.

British shipping.

Great Britain has likewise benefited to a considerable extent, whereas in 1892, as will be seen from Annex A, there were 107 ships with 62,718 register tons; last year there have been 195 with 131,026 register tons, or an increase of 88 ships and 68,308 tons.

Exchange.

The exchange has not fluctuated to any great extent during the past year. Formerly the Berlin quotations ruled in a great measure the value of the rouble, but last year, owing to the energy of the Finance Minister, the Petersburg money market seems to have exercised greater power over this important factor of trade.

Harvest.

The harvest in this neighbourhood, owing to the long period of drought during the growing time and the continuous rain during harvest time, has not been at all favourable, either

as regards quantity or quality, especially of rye and oats, the colour and weight of the latter being very disappointing, and on shipment giving cause for great dissatisfaction to both buyers and sellers.

Rye was of very inferior quality and of very light natural weight. The linseed crop likewise suffered considerably from the excessive rains of the autumn.

Annex B shows the principal articles of export from the port of Libau for the year 1893, and amongst these articles will be noticed one which has not previously appeared in these tables, viz., hay. During the early months of last summer, when already a fair approximation of the probable result of the hay crop in England could be made, many applications were addressed to this Vice-Consulate for names of shippers of hay, but the trade as an article of export from Libau was non-existent, and had to be created. The earlier shipment of old hay (1892 crop) from the immediate neighbourhood in loose bundles, *i.e.*, not hydraulic pressed bales, I understand gave satisfaction to the receivers in England, but gradually this article began to come forward from the interior in pressed bales, and soon complaints were rife; large parcels of hay were shipped, and on arrival the bales, looking sound externally, were found to be damaged inside and very flaggy. They had, no doubt, been packed wet, and were shipped in an unsound condition. The shippers must have lost heavily, and the receivers also, owing to the bad quality which they would have been unable to deliver on contracts made. Large quantities have likewise been shipped to France. Exports.

The export of oats compared with 1892 shows the large balance of 1,145,618 quarters in favour of 1893; this is accounted for by the failure of the crop in France and the large quantities of both white and black oats exported to that country especially, and to Belgium. Formerly France took mostly black oats from this port, but latterly has bought large quantities of white oats of so-called fair average quality, with a guaranteed maximum of admixture of grain other than oats, such as barley, from 3 per cent. up to 9 per cent. Oats.

The reason being that barley was so cheap, there was but little outlet for this grain, whereas oats, which are usually cheaper than barley, were very much dearer last year. This mixing of oats with barley can hardly be called adulteration, as the sales, both to Great Britain and France, have been made either on sample or with the maximum of admixture guaranteed. Nevertheless, it is not a wholesome way of buying an article with the foreknowledge that such article was adulterated or mixed either intentionally or otherwise, and ought not to be countenanced. Samples of all grain shipped are now taken by the Government officials with the view of fixing the percentage of admixture of foreign grain, and ascertaining the percentage of sand and dirt loaded with the grain.

The export of barley has fallen-off considerably in con- Barley.
(1700) B 3

sequence of the mixing before named, and of the impossibility to export to Germany.

Rye. Rye, up to 1892, about the chief, if not quite the principal article of export to Germany, has fallen off to an enormous extent, and might almost be said to have fallen away entirely. This is attributed to several causes: (1) to the inability to compete with the South Russian ports which have the principal rye-producing provinces to fall back upon; (2) to the poor and inferior quality of the crops in the contiguous districts of Courland and Lithuania; and lastly, though by no means least, to the Russo-German tariff war imposing enormous duties on all Russian grain.

Linseed. Linseed has likewise fallen very much below the normal standard, this being attributable to the failure of the crops to a great extent, and likewise to the bad trade in the principal oil-crushing centres, Hull, &c., also to Indian, American, and other competition.

Peas. Peas, lentils, and other crops of this description were good, especially the ordinary white fodder peas, which are of very good quality and abundant. Owing to the long-continued drought in the past spring in France, which completely destroyed the tares sown, a very large quantity of these articles were shipped to that country up to as late as June, for second sowing, and prices were very high owing to the large demand.

Eggs. Eggs have slightly fallen off in number during the past year. Owing to the recent famine the peasants had to kill off their hens, not having any food for them.

Horses. The export of horses continues for mill and agricultural purposes, but sheep have fallen off considerably, so that the anticipations of a large export trade to France have not been realised.

Flax. Flax and hemp show a decline in quantity, but this is only a transit trade. There are no flax dealers in Libau, and the export is in the hands of forwarding agents.

Total value of exports. The total value of exports amounted to 3,153,937*l.*, against 2,702,303*l.* in 1892.

Imports. The staple articles of import, coals, iron, dyewood, machinery, chemical manure, cotton, cement, and herrings do not evince any remarkable fluctuations calling for special remark.

Total value of imports. The total value of imports for the year amounts to 2,345,048*l.*, against 1,739,116*l.* in 1892.

**Manu-
factories—
Linoleum.** The cork manufactory already established here for some years by a Swedish firm is building a large manufactory for turning out linoleum floor cloth, which will commence working during the coming summer, the company having obtained the working rights for some new patents. With this single exception the factories of the place and neighbourhood remain unchanged.

Public works. In August last, His Majesty the Emperor, accompanied by the Empress and the Imperial family, visited Libau for the purpose of laying the memorial stones of the new commercial

and naval harbours. The Government are still working at the latter, which will take some years before it is finished.

The commercial harbour has now been dredged to a depth of 19 feet in mid-channel, and vessels of that draught can load accordingly.

Emigration viâ Libau seems to be thoroughly established, and there are frequent opportunities of sailing from this port. The route usually adopted is viâ Rotterdam or Belgium, most of the emigrants finding their way to the United States of America, Canada, and South Africa, but very few proceed to Great Britain. Two Hamburg firms of emigration agents have opened offices at Libau. The warnings issued by the Vice-Consulate respecting the overstocked condition of the labour market in England are of little avail. Emigration.

The public health at Libau during the past year has been very good. During the early autumn there was a slight epidemic of dysentery, or cholérine, but it never attained large dimensions, and was doubtless attributable to the eating of unripe fruit, or unwholesome food. Public health.

The Government have placed a new lightship (steamer) off the port of Libau, about 6 miles from the shore, provided with a powerful electric light, which can be seen better than the lighthouse light. The movements of this vessel and its position cannot, however, be relied on. New electric lightship.

The wreck of the s.s. "Vernon" off the coast, about 8 miles south of Libau, near Bernathen, was the only casualty of any moment to British shipping, and this was attributable to foggy weather and the vessel running on a reef of rocks not marked on the chart. This is the second or third casualty happening at the same spot. Captains of vessels should keep as much out to sea as possible when they are not certain of their position. Casualties.

Annex A.—RETURN of all Shipping at the Port of Libau during the Year 1893 (o.s.).

ENTERED.

Nationality.	Sailing.		Steam.		Total.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.
British	4	596	191	130,430	195	131,026
Russian	168	18,276	178	52,194	346	70,470
German	16	2,218	179	79,658	195	81,776
Norwegian	21	4,646	63	21,046	84	25,692
Swedish	5	894	211	69,622	216	70,416
Danish	53	5,906	217	144,472	270	150,078
French	1	192	3	1,770	4	1,962
Dutch	1	78	4	2,048	5	2,124
Total	269	32,506	1,046	501,038	1,315	533,544
„ for the year preceding	304	38,398	920	395,516	1,224	433,914

RUSSIA.

CLEARED.

Nationality.	Sailing.		Steam.		Total.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.
British	4	596	188	126,404	192	127,000
Bohemian	141	14,166	176	30,694	317	44,860
German	16	2,218	183	82,218	199	84,436
Norwegian	22	4,864	63	21,646	85	26,510
Swedish	5	894	266	69,426	271	70,320
Denish	53	5,666	212	130,482	265	136,148
French	1	192	3	1,770	4	1,962
Dutch	1	78	2	1,894	3	1,972
Total	243	28,614	1,035	494,214	1,278	522,828
for the year preceding	283	37,898	917	390,740	1,200	428,638

Annex B.— RETURN of Principal Articles of Export from Liban during the Years 1893–92.

Articles.		1893.		1892.	
		Quantity.	Value.	Quantity.	Value.
Grain	Quarters*	1,308,881	£	825,011	£
Pulse	"	30,186	"	48,192	"
Crushing seeds	"	169,264	"	192,854	"
Linseed and other oilcakes	Tons	16,832	"	28,925	"
Rye, wheat, bran, and other meals	"	40,812	"	14,466	"
Flax, hemp, yarns, &c.	"	32,661	"	33,657	"
Petroleum, oleonaphthe, turpentine	"	6,085	"	12,783	"
Fresh and salt meat	"	1,146	"	260	"
Game and poultry	"	629	"	676	"
Raw and other hides	"	2,582	"	3,328	"
Wood and staves	"	1,826	"	4,060	"
Spirits and alcohol	Gallons	2,110,663	"	398,927	"
Wool	Pieces	71,005	"	93,426	"
Staple goods	"	1,125,465	"	1,060,600	"
Timber and other wood goods	Cubic feet	1,149,419	"	808,192	"
Fur	Pieces	58,633,000	"	43,671,000	"
Honey	"	1,225	"	1,265	"
Livestock	"	3,651	"	6,150	"
Hay	Tons	5,350	"	...	"
Total	"	...	3,158,987	...	2,702,303

* 1 imperial quarter grain = 11½ pecks.
 1 " pulse = 560 lbs. English.
 11. sterling = 10 £.
 1 ton = 62 pecks.
 1 imperial quarter linseed = 424 lbs. English.
 10 vedros = 21½ gallons.

**Annex C.—RETURN of Principal Articles of Import to Libau
during the Years 1893–92.**

Articles.			1893.		1892.	
			Quantity.	Value.	Quantity.	Value.
Coal and coke	Tons	...	70,858	£	76,426	£
Iron, all kinds, and steel...	"	...	8,419	...	3,570	...
Dyewoods	"	...	6,704	...	6,858	...
Agricultural and other machinery	"	...	2,872	...	387	...
Chemical manure	"	...	11,947	...	12,520	...
Cotton and jute	"	...	12,196	...	8,430	...
Cement	"	...	16,295	...	13,900	...
Herrings—						
Norwegian and Swedish	Barrels	...	93,962	...	95,974	...
Scotch	"	...	118,650	...	115,666	...
Other articles		...	...	...	...	...
Total... ..		...		2,345,048		1,739,116

**Annex D.—TABLE showing the Total Value of all Articles
Exported from and Imported to Libau from and to Foreign
Countries during the Years 1893–92.**

Country.	Exports.		Imports.	
	1893.	1892.	1893.	1892.
	£	£	£	£
Great Britain	1,153,169	1,362,740	1,083,216	789,162
Germany	396,522	424,805	569,012	568,320
Holland	166,067	108,465	4,074	1,778
Belgium	354,014	280,347	145,220	63,866
Sweden	86,039	134,346	132,987	75,608
Norway	18,786	14,816	46,375	23,822
France	587,876	171,854	44,354	63,029
Denmark	243,464	181,383	17,695	13,489
America	147,788	..	231,767	81,266
Other countries	232	23,547	69,848	58,786
Total	3,153,957	2,702,303	2,345,048	1,739,116

WINDAU.

Mr. Vice-Consul Schenck reports as follows:—

The shipping trade at this port during the year 1893 was duller Navigation. than in the year preceding; the total number of vessels entered being less by 42 gauging 8,651 tons, and those cleared by 42 vessels of 6,262 tons; 29 British steamers of 16,355 tons and 142 foreign vessels of 42,789 tons entered at Windau last year, showing that the British flag only occupied 27 per cent. of the carrying trade. Danish vessels came next with 28 per cent., then followed the German and Russian shipping.

The depth of the water on the bar last year was greater than in 1892, in consequence of the dredger working throughout the summer, the depth being 18 feet, and in the autumn 15 to 16 feet.

Exports—
Wood.

Wood continues to be the principal article of export from Windau, the quantity shipped last year was a little under that in 1892, the falling-off was principally in redwood timber.

Redwood
square and
round
sleepers.
Redwood and
whitewood
deals and
battens.

There was an active demand for redwood square and round sleepers, and the stock of this class of goods is nearly sold out at this place.

At the beginning of the year 1893 only a small quantity of redwood and whitewood deals and battens could be exported, as during the preceding winter Messrs. Gutschmidt Brothers' sawmill was destroyed by fire. After the reconstruction of the mill the trade in these articles was brisker, and large quantities were exported during the autumn.

Aspen wood.
Pit-props and
pulp-wood.

The export of aspen wood was animated throughout the year, as also a fair quantity of pit-props and pulp-wood.

The prices of all sorts of wood were last year about the same as in the year before.

Grain.

The grain trade during the past year was less important than in 1892. In the spring only two steamers loaded barley for Holland. The exporters at Windau were obliged to sell, as in the year before, their stocks of rye, barley, and oats to Riga and Libau merchants, as better prices were obtainable at those ports than offered from abroad, notwithstanding that the prices of all sorts of grain were cheaper at this place last year than in the year before. The new grain crop was bad, especially the spring sown.

Sowing
linseed.

The shipment of sowing linseed was somewhat larger last season than in the previous year, and the price was also cheaper than in 1892. This article was equally sold to Riga, because there was less demand for it.

Spirit.

The export of spirit from this port was less than in the year before by 177,392 degrees.

Value of
exports.

The value of the exports from Windau last season was 95,900*£*, being 5,576*£* less than in 1892.

Value of
imports.

The import trade at Windau last season was also less than in 1892. The value of all imports was 7,357*£* against 7,611*£* in 1892. The principal articles were coal, herrings, and machinery, the last named being for two new sawmills which were built here last year.

Annex A.—RETURN of all Shipping at the Port of Windau during the Year 1893.

ENTERED.

Nationality.	Sailing.		Steam.		Total.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.
British	...	...	29	16,355	29	16,355
Russian	32	6,128	15	3,440	47	9,568
German	4	370	24	13,518	28	13,888
Swedish	2	204	5	1,118	7	1,322
Danish	14	1,118	34	15,476	48	16,594
Norwegian	6	402	3	502	9	904
Dutch	1	300	...	...	1	300
Netherlands	2	213	...	...	2	213
Total	61	8,735	110	50,409	171	59,144

CLEARED.

Nationality.	Sailing.		Steam.		Total.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.
British	...	...	29	16,355	29	16,355
Russian	41	8,821	18	4,835	59	13,656
German	4	370	24	13,518	28	13,888
Swedish	2	204	5	1,118	7	1,322
Danish	14	1,118	34	15,476	48	16,594
Norwegian	6	402	3	502	9	904
Dutch	1	300	...	...	1	300
Netherlands	2	213	...	...	2	213
Total	70	11,428	113	51,804	183	63,232

RETURN of Principal Articles Imported to and Exported from Windau during the Years 1893–92.

IMPORTS.

Articles.			1893.		1892.	
			Quantity.	Value.	Quantity.	Value.
Steam coals ..	..	Tons ..	1,239	£ 1,558	2,550	£ 2,837
Salt herrings ..	..	Barrels ..	5,290	2,718	6,906	3,950
Wine ..	..	..	..	125	..	387
Machines ..	..	Tons ..	461	1,026	..	..
Other articles ..	..	..	..	1,030	..	437
Total ..	..	..	..	7,357	..	7,611

RUSSIA.

EXPORTS.

Articles.		1893.		1892.	
		Quantity.	Value.	Quantity.	Value.
Wood	..	..	£ 79,205	..	£ 80,033
Grain (only barley)	Tchetverts	6,065	3,820	19,140	10,489
Sowing linseed ..	Barrels ..	2,455	2,580	2,015	2,015
Spirits	Per cent.	3,912,383	10,290	4,089,725	8,179
Other articles ..	..	..	5	..	760
Total	..	..	95,900	..	101,476

TABLE showing the Total Value of Articles Exported from and Imported to Windau from and to Foreign Countries during the Years 1893-92.

Country.	Exports.		Imports.	
	1893.	1892.	1893.	1892.
	£	£	£	£
England	47,193	47,398	1,451	2,340
Germany	18,873	22,611	2,902	1,306
Belgium	7,405	6,988	..	..
Holland	15,894	20,355	..	..
Denmark	1,677	1,922	83	..
Norway and Sweden ..	1,882	1,612	2,960	3,965
France	2,976	590	11	..
Total	95,900	101,476	7,357	7,611

PERNAU.

The Vice-Consul at Pernau reports as follows :

Flax trade.

All through the past year the flax market at Pernau has been very steady at gradually improving prices, and towards the close of the shipping season there was such an active demand that prices advanced several pounds per ton, although the quality was not so good as had been expected and as shippers could have wished it; the weather having done more harm to the plant than it had been generally suspected before the steeping took place, nevertheless, all that was offered for sale found buyers at full prices so that at the close of our shipping season there were no stocks left of the 1892 crop neither here nor in all our other districts.

Flax crop.

The new crop was favoured by good weather, and has been mostly secured of good quality and a full average in quantity very early in the season, and as supplies came forward liberally,

a large business was done during November and December for spring shipment at gradually advancing prices, which are at present quite 5*l.* per ton to 6*l.* per ton higher than that paid at this time last year, and the top does not yet appear to have been reached. There has been no regular winter as yet in our provinces nor have sledge roads been established, nevertheless the stocks of fresh flax at this place are estimated already at about 4,000 tons. Our principal buyers have been the Irish and Scotch spinners; on the Continent only Portugal and France have taken a few hundred tons; such a rise in the prices of flax has not taken place here for the last 15 years.

The grain crops in this district have turned out moderate in quantity and of fair average quality, and as prices have ruled high for all cereals here during the past year, very little barley only was shipped to continental ports, the remainder, as well as all rye and oats, being wanted for home consumption and to replenish our empty granaries. Grain crop.

The first British steamer arrived here in the first week of May. 21 boats followed, all of which were chartered in the United Kingdom. One cleared for France with flax and another for Riga for want of cargo, there being nothing to be had here for shipment. British shipping.

The value of the total exports from Pernau for the year 1893 amounted to about 443,000*l.*, of which about 337,000*l.* went to Ireland and Scotland. Total value of exports.

The imports at Pernau have usually been quite unimportant, the total value amounted to only about 12,000*l.*; this trade will, however, be greatly extended in a couple of years, as a branch railway line will be built this year to Walk which will open to Pernau, the inland trade supplying consumers at lower prices than Riga and Reval can do with coal, salt, herrings and colonial goods; the distance hence being much shorter than from those places. It will also increase our export trade. Total value of imports.
Projected railway extension to Pernau.

The cholera has again spared our place, the same as in 1892. Cholera.

In my annexed calculations I have fixed the average exchange for the past year at 100 r. for 10*l.* sterling.

Annex A.—RETURN of all Shipping at the Port of Pernau during the Year 1893.

ENTERED.

Nationality.	Sailing.		Steam.		Total.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.
British	...	...	22	25,781	22	25,781
German	2	60	13	5,568	15	5,628
Danish	1	90	4	1,760	5	1,850
Norwegian	4	236	2	1,846	6	2,082
Swedish	1	76	1	238	2	414
Russian	14	2,306	...	...	14	2,306
Total	22	2,768	42	35,293	64	38,061
„ for the year preceding	21	2,066	51	46,634	72	48,700

CLEARED.

Nationality.	Sailing.		Steam.		Total.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.
British	2	60	22	25,781	22	25,781
German	1	90	13	5,568	15	5,658
Danish	4	236	4	1,760	5	1,996
Norwegian	1	76	2	1,846	6	2,022
Swedish	12	2,066	1	338	12	414
Russian*						2,066
Total	20	2,528	42	35,293	62	37,821
„ for the year preceding ...	21	2,066	51	46,634	72	40,700

* Two Russian sailing vessels remain in port.

Annex B.—RETURN of the Principal Articles of Export from
Pernau during the Years 1893–92.

Articles.		1893.		1892.	
		Quantity.	Value.	Quantity.	Value.
Flax and flax codilla	Tons	12,495	£ 399,614	16,715	435,940
Barley	Quarters	16,140	19,190	24,241	22,210
Rye	„	...	4,339	722	1,027
Crushing linseed	...	3,556	6,186	...	9,374
Sowing linseed	Barrels	17,000	17,662	14,590	15,404
Wood goods	Pieces	51,168	1,640	49,345	2,127
Other articles	...	...	329	...	...
Total	...	...	443,284	...	496,079

RETURN of the Principal Articles of Import to Pernau during
the Years 1893–92.

Articles.		1893.		1892.	
		Quantity.	Value.	Quantity.	Value.
Herrings	Barrels	5,230	£ 5,240	5,322	£ 2,666
Coals and coke	Tons	2,180	2,076	2,966	2,765
Chemical manure	„	700	1,770	867	5,084
Grind and whet-stones	„	103	235	...	...
Corkwood	„	226	720	110	306
Wool	„	8	1,070	5	708
Cast-iron	„	54	230	61	180
Sundries	...	...	937	...	992
Total	...	...	12,268	...	16,997

Annex C.—TABLE showing the Total Value of all Articles
Exported from and Imported to Pernau from and to
Foreign Countries during the Years 1893–92.

Country.	Exports.		Imports.	
	1893.	1892.	1893.	1892.
	£	£	£	£
Great Britain	337,042	365,003	4,189	6,347
Germany	17,652	15,404	2,518	1,729
France	54,883	55,789	..	..
Holland.. ..	16,324	22,210	..	..
Denmark	133	..	97	75
Belgium	2,057	18,996	..	..
Portugal	15,173	8,677	..	..
Norway.. ..	..	..	5,239	2,666
Sweden.. ..	..	..	225	390
Tota'	443,264	486,079	12,268	11,207

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DIPLOMATIC AND CONSULAR REPORTS ON TRADE
AND FINANCE.

RUSSIA.

REPORT FOR THE YEAR 1893

ON THE

TRADE, &c., OF BATOUM.

REFERENCE TO PREVIOUS REPORT, Annual Series No. 1191.

Presented to both Houses of Parliament by Command of Her Majesty,
MAY, 1894.

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RUSSIA.

BATOUM.

Consul Stevens to the Earl of Kimberley.

My Lord,

Batoum, March 31, 1894.

I HAVE the honour to forward, herewith enclosed, my Report on the Trade of this Consular District for the year ended December 31, 1893.

Subjoined I also transmit Reports drawn up by the Vice-Consuls at Novorossisk and Poti on the Commerce of their respective ports for the same period, which, owing to the difficulties experienced by those gentlemen in obtaining the necessary statistics, have only reached me now.

I have, &c.

(Signed) P. STEVENS.

*Report on the Trade and Commerce of the Consular District of
Batoum for the Year 1893.*

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General
remarks.

To judge by the sum totals that appear in the returns hereto annexed, the trade of Batoum for the past year, on the whole, appears to represent a fairly flourishing state of affairs, in so far that whilst the exports have somewhat increased, the falling off in the imports was but insignificant.

The general situation was, however, anything but reassuring, and a downward tendency was persistently maintained in almost all branches of commerce during that period in consequence of the unhealthy state of the petroleum industry, which in reality is the backbone of the trade of Batoum, and upon which most of the other business transacted is in a more or less degree dependent.

Many attempts to bring about an understanding between the naphtha producers, petroleum refiners, and other persons interested in the mineral oil trade were made, but as no improvement in the existing condition of things could be brought about, probably owing to the antagonism and party feeling prevailing among the

many mixed nationalities that are concerned in the naphtha industry, the Government stepped in, and although no definite measures, with a view to giving the industry the necessary stability to cope with external adverse circumstances, had been adopted up to the close of the year, it is, nevertheless, hoped that the innumerable meetings which were held at the Russian capital during the past and present years, will shortly lead to the formation of a Union of at least 85 per cent. of the naphtha producers, who by combined action, it is expected, will succeed in regulating and controlling the industry and trade in such a manner as to place themselves in a position to work at a fairly remunerative profit, and thus to compete with the oil exporters on the other side of the Atlantic, who appear to be steadily maintaining their ground in regard to supplying the requirements of the markets of the world.

It is reported that if an arrangement of this sort is arrived at, the Government will be willing to accord a reduction in the tariff now charged for the transport of oils by rail from the Caspian to the Black Sea, and it is also possible that some additional concessions in favour of the trade may be made later on.

Many other rumours are current in connection with this report, but until more positive information on the subject be forthcoming, I do not propose to here make any further remarks.

In all 263 British steamers of 400,836 registered tons visited the port of Batoum during the past year, showing a decrease of 14 vessels as compared with the year 1892; and 266 British vessels of the tonnage of 405,938 registered tons cleared, or one steamer less than in 1892. The decrease in this number of vessels is, however, more than counterbalanced by the increase in tonnage, which clearly proves that the shipping trade of this port attracted a larger class of steamer last year.

An important feature which well deserves notice has recently been very successfully introduced by a London firm into the carrying trade of petroleum from Batoum to Eastern ports beyond the Suez Canal, in the shape of tank steamers of a new type which carry oil in bulk, and which, after thoroughly cleansing their tanks with comparatively speaking quick despatch and little expense, by means of forced ventilation, pressure of steam, and chemical treatment, are enabled to load homeward-bound cargoes, such as tea, coffee, rice, and other goods particularly liable to deterioration, and deliver them in good order and condition at Mediterranean, Continental, and United Kingdom ports.

The total number of vessels of various nationalities that entered the port of Batoum during the year 1893, including Russian ships engaged in the coasting trade, was 1,095 of the aggregate tonnage of 1,147,948 tons, and 1,101 vessels of the tonnage of 1,133,116 tons cleared. A reduction of 59 vessels entered and of 7 vessels cleared therefore took place as compared with the figures of the previous year, and a falling off of 12 Norwegian steamers has also to be noted.

The majority of the vessels that visited Batoum during the past year loaded oil of various descriptions in bulk for the United Kingdom, France, Belgium, Germany, Austria, Italy, Spain, Roumania, and Japan; and illuminating oils in cases for Turkey, Greece, Egypt, India, Java, China and Japan; only a small proportion of them carrying general goods to United Kingdom and Continental ports.

The shipping return for 1893 would in all probability have shown a considerable increase in the arrivals at and departures from Batoum during the year, had the Russian Steam Navigation and Trading Company, the Messageries Maritimes, the Paquet Company, Austrian Lloyds, and Pan-Hellenic Company continued to maintain their regular weekly and fortnightly lines of steamers along the Anatolian coast throughout the year, unfortunately however, owing to the existence of cholera in the Caucasus and the unreasonably stringent quarantine measures enforced by the Turkish authorities against arrivals from Batoum, which occasioned great loss of time to vessels, these companies were compelled to make Constantinople their terminus for their steamers, and order them back to the Mediterranean without allowing them to proceed up the Black Sea.

Little or nothing was done during the year towards the improvement of the outer harbour, and the great want of proper moorings is still sorely felt by the shipping. The inner harbour was in some places deepened to about 22 feet, and slow progress was made with the extension of the breakwater at the entrance to the port. In the latter case, considerable difficulties have to be contended with in consequence of the extreme depth of water at that spot, and the masonry work can only be advanced in a north-easterly direction in the same ratio as the mole end is silted up with deposits brought down by the currents from the River Tcheroch. The Government has also sanctioned an expenditure of 75,000*l.* for the construction of a harbour for coasting vessels.

Exports.

A total increase of 109,612 tons, valued at 191,412*l.*, took place in the exports from Batoum during the year as compared with the figures of the preceding year, and petroleum products alone show an augmentation of 112,252 tons.

The total quantity of mineral oil products shipped at Batoum in 1893 was 1,043,531 tons, which total is made up as follows, viz., 25,826 tons of crude oil, 92,052 tons of lubricating oil, 149,391 tons of illuminating oil (distillate), and 776,312 tons of refined oil or kerosene.

Of these quantities 152,095 tons went to the United Kingdom, 164,892 tons to India, 3,055 tons to Malta, 123,996 tons to Austria-Hungary, 78,895 tons to Java, 57,803 tons to Belgium, 55,826 tons to France, and the remainder, in quantities up to about 39,000 tons and less, to various other countries as shown in annex D to this report.

British share.

Great Britain took 2,069 tons more Russian crude oil in 1893 than she did in 1892, 14,095 tons more lubricating oil, 4,891 tons less distillate, and 17,061 tons less kerosene; and 10,675 tons

more kerosene was despatched from Batoum to India than in 1892. 19,422 tons more petroleum products were shipped at Batoum for Russia in 1893, as compared with the figures of 1892.

Owing to the reduction of the import duty on Russian oils in ^{Kerosene.} France during the past year, the exports from Batoum to that country also increased by 15,581 tons. Germany and Turkey took less than they did in 1892, and the demand for Caucasian oil products in other countries was about equivalent to that of 1892.

The quantity of kerosene shipped from Batoum in cases amounted to 414,973 tons, the quantity that left the country in barrels was 20,831 tons, and the remaining 607,777 tons were despatched in bulk.

The liquorice root trade with America appears to be on the ^{Liquorice.} steady increase. Out of the total quantity of root and paste shipped from Batoum in 1893, 16,720 tons were forwarded to the United States, the balance of 1,196 tons being shipped to England and France. Out of the latter-mentioned quantity only about 300 tons were paste and the rest pressed roots.

Over-production has brought about more or less of a crisis in this trade, and about 14*s.* 7*d.* was being paid towards the end of the year to the peasantry for every ton of root delivered at the factories in the Governments of Baku and Elizavetpol. The result was that little or no root was being collected by the natives, and I understand that in consequence of the large quantities of pressed roots in stock, two out of the three root-pressing works of the Caucasus remained inactive during a portion of the past year.

The manganese ore export trade did not profit much during the ^{Manganese ore.} past year by the completion of the Sharopan branch railway between the mines and the Trans-Caucasian main line. The branch line has been badly constructed and is even now not in proper working condition. Portions of it, such as bridges and embankments, are continually being washed away by the frequent floods that occur in that district, and the existing rolling stock is insufficient to meet the requirements of the trade, hence the reasons why the mine owners were not able to avail themselves much of it, and considerable quantities of ore are still being brought down to the main line on pack horses.

As the export trade from the Trans-Caucasus to America is ^{American trade.} annually assuming larger proportions, I have here below drawn up a separate statement giving the quantities of the different articles, together with their approximate values, that left the eastern ports of the Black Sea in 1893, for conveyance across the Atlantic:—

Articles.	Quantity.	Value.
	Tons.	£
Liquorice root	16,720	125,520
Manganese from Batoum	1,178	3,075
" Poti	30,422	77,158
Khorassan wool	581	33,585
Turkestan	338	15,114
" "	9	327
Carpets	..	96
Personal effects	..	207
Total	49,248	255,082

Tin-plates.

The quantity of tin-plates imported to Batoum from Swansea in 1893 shows a falling off of 3,796 tons, and the coal figures have undergone a further decline, only 1,208 tons for consumption at the several petroleum can and case factories having been imported during the year.

Coal.

A coal dearth was again experienced at Batoum during the past winter, and exorbitant prices are still being paid for coal for domestic purposes owing to the short production at the Russian coalfields on which the Black Sea ports are dependent for their supplies. It would, therefore, be a great boon to the inhabitants of the town and surrounding country if the much-talked-of reduction in the import duty now charged on foreign coal was sanctioned by the Government. Unfortunately, however, an influential party, chiefly composed of owners of mines in the coal producing districts of Bahmut and the Don Basin, whence the eastern Black Sea ports now derive their supplies, are naturally so much opposed to the introduction of the measure, that it is feared they will continue to use their utmost endeavours to prevent its adoption.

The Caucasian coalfields at Kvibul remained idle during the year owing to the want of money, but the Government has advanced a sum of 30,000*l.* in order to enable the proprietor of the mines in that district to re-commence operations.

Timber.

In spite of the duty on sawn timber having been increased in the early part of 1893, the quantity of deals for the manufacture of petroleum cases brought from the Danube during the past year not only shows no falling off, but, on the contrary, an actual increase of 2,900 tons has taken place.

By far the greater part of these planks are not produced from Roumanian-grown timber, but are really of Austrian origin, and come from the Austrian, or rather Hungarian, side of the Carpathians. The booms are made up into rafts and floated down the Danube to Galatz, where there are large saw-mills, the principal one formerly belonged to an Austrian firm, but has since been turned into a Roumanian limited liability company. During the summer the shipments are made from Galatz, and after the closing of the navigation on the Danube they are shipped at Sulina, where, I am informed, mills have also been set up.

The changes that have taken place in the other items of import are so insignificant that they do not call for any special mention.

Considerable quantities of Russian beetroot sugar from the Beetroot. refineries in the Government of Kieff and at Odessa passed over the Trans-Caucasian railway during the year for Baku, and were thence forwarded to the Trans-Caspian district and Persia.

The transit of Trans-Caspian productions through Batoum greatly diminished in 1893 as compared with the preceding year, owing to the opening of the newly built railway between Beslan, a station on the Vladikavkaz line, and Petrovsk on the Caspian Sea. This line is likely to divert most of the traffic from the Russian possessions in Central Asia, and vice versâ, which has been in the habit of heretofore passing through Batoum and Poti to the northern ports of the Caspian. The Northern or Cis-Caucasian Railway, which belongs to a private company, runs through a flat country and has cost very much less to construct than the Trans-Caucasian line which traverses a very mountainous region. The company has, therefore, the advantage over the Government line, inasmuch as it can afford to carry goods at a lower rate of transport. The quantity of goods carried by the new railway is progressively increasing, and all raw and manufactured materials from Trans-Caspia are already being forwarded by that route. The transport trade through the districts through which the new line passes will without doubt assume much larger proportions than have yet been attained after the transfer of the Central Asian Railway terminus from Usun-Ada to Krasnovodsk ; but at present great scarcity in rolling stock is experienced, and all the available stores at Petrovsk are literally overcrowded with goods awaiting their turn for conveyance to Russia proper.

In order to as much as possible facilitate the transport of Central Asian goods to Russia, the Vladikavkaz Railway Company has also come to an arrangement with a prominent firm of steamship owners on the Caspian Sea, to run a regular line of steamers between Uzun-Ada and Krasnovodsk and Petrovsk. Most of the Central Asian cotton which hitherto has passed through Batoum is now being carried viâ Petrovsk, and the railway company has likewise bound itself to furnish, by the winter of 1894-95, an ice breaker which is to keep the navigation of the port of Petrovsk open, and thus enable the company's steamers to maintain a regular service between those points during the winter months.

The accompanying annexes give the quantities of different oils Annexes. produced in the Apscheron Peninsular by the wells at Sabunchi, Romani, and Bibi-Aibat ; and further statistical information regarding the activity exhibited in connection with the drilling of wells, refining of oils, &c., from January 1, 1889, up to the end of the past year, will also be found in them. As the returns speak for themselves, it is unnecessary that I should make any comments on the subjects to which they refer.

Mention should, however, be made of the extensive oil fields New oil fields. recently discovered at Grozni on the Vladikavkaz-Petrovsk line. The present rate of production of the wells in that district does not

as yet reach such enormous figures as the output of oil by the wells in the district of Baku. By all appearance, however, oil exists in great abundance in the recently opened up region, which threatens to become a very formidable competitor of Baku, more especially as the cost of transport by the Vladikavkaz Railway to Rostoff and Novorossisk can be effected at considerably less cost than from Baku to Batoum, and will probably result in a large proportion of the supplies for Russia being drawn from the new source.

Annex A.—RETURN of all shipping at the Port of Batoum during the Year 1893.

ENTERED.

Nationality.	Sailing.		Steam.		Total.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.
British	...	...	263	400,836	263	400,836
Russian	52	6,201	427	429,566	479	435,767*
French	...	...	70	93,182	70	93,182
Austrian	5	2,286	60	52,730	65	55,016
Greek	78	38,329	20	27,212	98	65,541
German	...	...	20	22,570	20	22,570
Turkish	39	7,468	...	...	39	7,468
Norwegian	...	...	14	20,758	14	20,758
Danish	...	...	13	13,460	13	13,460
Other countries ...	11	8,118	23	30,297	34	38,415
Total	185	57,397	910	1,090,851	1,095	1,147,948
... for the year preceding ...	270	86,497	884	990,523	1,154	1,076,920

CLEARED.

Nationality.	Sailing.		Steam.		Total.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.
British	...	...	266	405,938	266	405,938
Russian	53	6,498	427	429,566	480	436,064*
French	...	...	70	93,182	70	93,182
Austrian	5	2,286	60	52,730	65	55,016
Greek	94	40,247	19	25,945	113	66,192
German	...	...	20	22,570	20	22,570
Turkish	42	8,242	...	...	42	8,242
Norwegian	...	...	15	21,071	15	21,071
Danish	...	...	13	13,460	13	13,460
Other countries ...	11	8,118	6	3,263	17	11,381
Total	205	66,391	896	1,067,725	1,101	1,133,116
... for the year preceding ...	239	74,483	869	975,300	1,108	1,049,783

* These figures include vessels engaged in the coasting trade.

Annex B.—RETURN of Principal Articles of Export from Batoum during the Years 1893–92.

Articles.	1893.		1892.	
	Quantity.	Value.	Quantity.	Value.
	Tons.	£	Tons.	£
Petroleum products ..	1,043,580	3,652,530	931,328	3,401,260
Wool ..	4,985	289,070	3,086	130,058
Liquorice root and paste ..	17,916	184,519	16,639	124,873
Manganese ore..	7,958	18,167	7,730	14,795
Grain ..	3,386	11,049	5,160	31,992
Walnut and other woods ..	2,569	25,149	..	..
Other articles ..	2,833	99,155	9,672	335,240
Total ..	1,088,227	4,229,639	973,615	4,038,218

RETURN of Principal Articles of Import to Batoum during the Year 1893–92.

Articles.		1893.		1892.	
		Quantity.	Value.	Quantity.	Value.
			£		£
Tin-plates ...	Tons	32,304	436,106	36,000	490,560
Coal ...	”	1,208	1,389	...	...
Timber planks ...	”	37,900	140,760	35,000	130,000
Colonial produce ...	”	121	2,780	4,500	...
Wire ...	”	100	11,580	4,000	...
Bricks and tiles ...	”	4,178	7,781	4,000	101,414
Hydraulic lime, &c. ...	”	...	...	7,000	...
Sulphur and caustic soda ...	”	6,210	8,428	...	...
Iron and cast-iron... ..	”	2,748	12,709	15,700	202,122
Tin and lead ...	”	1,537	82,202	...	...
Machinery ...	”	1,307	4,900	10,500	32,201
Bar silver ...	”	38	272,567	...	...
Fruits and Vegetables ...	”	653	3,918	...	...
Empty petroleum barrels ...	Number	375,000	7,520	374,000	...
Other articles ...	Tons	4,161	95,100	7,300	132,003
Total ...	...	...	1,087,740	...	1,108,300

Annex C.—RETURN of Value of Principal Articles Exported from
and Imported to Batoum from the undermentioned Countries
during the Years 1893–92.

Country.	Exports.		Imports.	
	1893.	1892.	1893.	1892.
	£	£	£	£
Great Britain	516,620	556,069	814,784	490,560
India	647,213	428,072	..	..
France	390,401	374,906	55,378	100,400
Germany	165,692	139,264	2,780	64,000
Austria	310,861	301,426	..	..
Belgium	319,574	322,762	14,094	82,000
China and Japan ..	326,169	325,171	..	..
Turkey	612,323	616,617	3,918	..
America	255,082	192,623	..	..
Roumania	11,318	13,023	140,760	130,000
Other countries ..	674,386	767,785	56,026	241,340
Total	4,229,639	4,037,718	1,087,740	1,108,300

Annex D.—RETURN of Shipments of Petroleum Products from Batoum during the Years 1893–92 (in Tons).

To—	Crude and Crude Residuum.			Lubricating Oils.			Illuminating Distillate.		
	1893.	1892.	In Barrels.	In Bulk.	Total, 1893.	Total, 1892.	In Bulk.	Total, 1893.	Total, 1892.
United Kingdom ..	5,470	3,401	53	19,738	19,791	5,696	13,193	13,193	17,084
Austria-Hungary ..	1,314	1,124	1,821	2,947	4,768	2,317	106,186	106,186	92,438
Belgium ..	6,916	5,415	1,007	16,373	17,380	20,086	852	852	310
Bulgaria ..	12	..	170	..	..	21	..	..	..
Cochin-China ..	..	..	..	..	..	..	..	..	..
China ..	..	..	..	..	..	..	..	..	..
Egypt ..	..	..	232	..	232	..	..	..	..
France ..	5,402	28	6,561	16,756	23,317	165	21,114	21,114	..
Germany ..	2,476	10,158	1,896	16,263	18,149	24,799	1,170	1,170	..
Holland ..	..	297	95	..	95	28,555	..	..	..
India ..	..	..	..	..	..	587	..	..	..
Italy ..	..	..	..	1,968	2,639	1,074	..	..	..
Japan ..	2,298	190	651	..	..	..	..	..	..
Java ..	..	..	..	..	..	..	..	..	..
Manila ..	..	..	..	..	..	..	..	..	..
Malta ..	..	..	..	..	..	..	..	..	..
Roumania ..	..	..	..	..	..	..	..	..	..
Siam ..	..	323	1,094	..	1,094	3	..	..	2,736
Spain ..	..	..	..	1,276	1,276	554	..	..	..
Turkey ..	11	1,175	608	..	608	22	..	..	..
Greece, Norway, and Denmark ..	..	4	..	..	..	257	..	..	..
Africa ..	..	..	33	..	33	123	..	..	..
Suez Canal ..	..	..	..	..	..	..	..	..	..
Total exports ..	23,899	22,115	14,221	75,331	89,552	83,909	142,515	142,515	112,568
Russia ..	1,927	253	2,500	..	2,500	2,635	6,876	6,876	7,131
Total shipments ..	25,826	22,368	16,721	75,331	92,052	86,544	149,391	149,391	119,699

RETURN of Shipments of Petroleum Products from Batoum during the Years 1893-92 (in Tons)—continued.

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RUSSIA.

To—	Refined Oil (Illuminating).					Total.	
	In Barrels.	In Bulk.	In Cases.	Total, 1893.	Total, 1892.	1893.	1892.
United Kingdom	..	113,641	..	113,641	130,702	152,095	156,883
Austria-Hungary	..	11,124	600	11,728	11,320	123,996	107,199
Belgium	..	32,655	..	32,655	36,991	57,803	62,192
Bulgaria	13	..	9,829	9,842	5,271	10,024	5,292
Cochin-China	..	..	2,581	2,581	5,132	2,581	5,132
China	..	4,534	83,304	37,838	38,889	37,838	38,889
Egypt	..	..	20,481	20,481	22,966	20,713	23,159
France	1	5,373	619	5,993	5,288	55,826	40,245
Germany	..	1,098	..	1,098	2,381	22,893	30,333
Holland	..	5,610	..	5,610	7,793	5,705	8,380
India	..	9,137	155,755	164,892	154,217	164,892	154,217
Italy	..	18,222	..	18,222	29,971	23,159	31,235
Japan	..	9,137	27,300	36,437	33,407	36,437	33,407
Java	..	..	78,895	78,895	56,925	78,895	56,925
Manila	..	..	8,526	8,526	2,441	8,526	2,441
Malta	40	8,015	..	3,955	3,439	3,955	3,442
Roumania	13	1,537	2,549	4,089	3,388	5,193	7,002
Siam	..	..	2,085	2,085	..	2,085	..
Spain	..	..	..	..	64	1,376	1,261
Turkey	1,221	..	64,789	66,010	79,640	66,639	79,901
Greece, Norway, and Denmark	..	..	..	..	420	33	642
Africa	..	..	680	680	516	690	516
Suez Canal	..	52,484	4,627	57,111	..	57,111	..
Total exports	1,288	267,571	412,570	681,429	626,101	937,395	844,564
Russia	2,791	89,333	2,403	94,533	76,745	100,186	86,764
Total shipments	4,079	356,904	414,973	776,312	702,846	1,043,581	931,324

RETURN giving Particulars of Shipments of Oil in Cases during the Years 1893-92 (in Tons).

To—	Quantity.	
	1893.	1892.
	Tons.	Tons.
India—		
Calcutta	56,193	59,012
Bombay	67,251	53,177
Kurachi	7,138	10,698
Singapore	6,206	8,970
Madras	5,103	8,917
Penang	6,095	3,092
Colombo	5,810	6,100
Tuticorin.. .. .	1,959	..
Total	155,755	149,966
China—		
Shanghai.. .. .	18,259	13,859
Hong-Kong	10,175	20,030
Amoy, Swatow, or Foochoo ..	4,867	..
Total	33,301	33,889
Japan—		
Yokohama	16,378	31,131
Kobé*	10,922	2,276
Total	27,300	33,407

* Actual port of discharge in doubt.

RETURN showing Increase in Quantity of Petroleum Products Exported in 1893 as compared with 1892.

Product.	Quantity.
	Tons.
Crude and residuum	3,458
Lubricating oils	5,508
Illuminating distillate	29,821
Refined oil	73,466
Total increase	112,253

Annex E.—RETURN showing Boring Operations in the Oil Fields of Balakhany, Salunchy, Romany, and Bibi Elbat from the Years 1889–93 inclusive.

Month.	Number of New Derricks erected Monthly.					Derricks at which Boring had not begun at End of Month.				
	1889.	1890.	1891.	1892.	1893.	1889.	1890.	1891.	1892.	1893.
January	..	4	20	4	10	..	43	64	37	33
February	..	6	13	1	9	..	41	61	31	31
March	..	16	11	2	8	..	45	61	31	34
April	..	11	9	4	4	..	46	33	29	34
May.. ..	..	18	14	6	4	..	57	55	20	30
June	..	24	7	1	3	..	75	55	30	31
July.. ..	13	19	0	1	1	31	78	47	29	31
August	9	11	24	7	1	29	65	58	35	27
September	12	15	4	0	5	31	66	54	29	23
October	12	23	3	6	2	33	73	53	29	29
November	15	11	6	2	4	39	63	49	38	27
December	10	13	10	11	5	47	61	46	31	29
Total	71	171	131	45	56	..	..	..	..	..

RETURN showing Boring Operations in the Oil Fields of Balakhany, Sabunchy, Romany, and Bibi Eibat from the Years 1889-93 inclusive—continued.

Month.	Wells in course of being Deepened on the 1st of the Month.					Number of Wells started Boring.				
	1889.	1890.	1891.	1892.	1893.	1889.	1890.	1891.	1892.	1893.
January	..	6	25	43	37	{				
February	..	8	20	51	41					
March	..	10	19	50	44					
April	..	8	21	39	41					
May..	..	14	23	32	42	33	9	11	6	4
June	..	13	21	13	37	{	9	19	6	8
July..	9	16	27	18	39		7	14	1	3
August	7	14	23	19	31		18	6	0	1
September	11	15	34	23	38		18	11	1	5
October	11	16	31	28	30	14	29	9	8	3
November	..	14	31	30	22	10	15	7	3	2
December	..	20	35	37	27	11	22	9	3	6
	7					6	14	15	9	4
Total	28	50	87	111	102	85	166	147	59	60

BATOUM.

RETURN showing Boring Operations in the Oil Fields of Balakhany, Sabunchy, Romany, and Bibi Eibat from the Years 1889-93 inclusive—continued.

Month.	Number of Wells Boring each Month.					Number of Wells completed.				
	1889.	1890.	1891.	1892.	1893.	1889.	1890.	1891.	1892.	1893.
January ..	36	74	145	141	62	8	1	7	13	10
February ..	..	79	150	131	57	3	4	15	6	3
March ..	..	82	154	127	69	2	6	12	10	3
April ..	..	86	149	117	64	2	5	13	7	4
May ..	..	91	160	94	69	7	9	14	8	4
June ..	..	91	142	84	73	4	7	10	5	6
July ..	42	91	141	44	69	4	7	11	5	2
August ..	47	99	145	45	65	3	7	8	6	4
September ..	46	116	140	52	59	6	4	10	6	5
October ..	63	124	136	43	60	3	9	13	5	4
November ..	63	129	129	50	58	5	16	11	9	4
December ..	73	138	122	58	59	5	11	17	3	8
Total ..	131	231	292	200	175	47	86	151	83	61

Annex F.—RETURN showing Number of Wells undergoing Repair, Number of Feet Bored, Number of Producing Wells, and Actual Amount of Crude Oil Pumped into Reservoirs from Wells in the Different Districts from the Years 1889-93 inclusive.

Month.	Number of Wells undergoing Repairs.					Total Number of Feet Bored each Month.				
	1889.	1890.	1891.	1892.	1893.	1889.	1890.	1891.	1892.	1893.
January	..	26	30	57	34	..	5,166	12,299	11,928	5,395
February	..	21	42	53	39	..	6,041	10,682	11,697	6,804
March	..	17	39	49	41	..	6,874	12,705	9,842	6,874
April	..	20	35	51	39	..	7,343	10,157	8,190	7,190
May..	..	18	34	45	41	19,320	9,226	14,532	9,100	8,863
June	..	19	39	27	43	..	8,834	11,837	4,508	7,966
July..	..	16	41	28	36	..	9,744	10,955	2,100	6,657
August	..	29	41	24	37	3,787	9,380	13,391	3,416	5,642
September	..	30	38	28	34	4,088	9,751	12,642	4,256	6,244
October	..	24	46	42	38	5,887	9,824	9,674	5,754	4,693
November	..	37	61	43	41	6,601	11,200	9,780	4,879	5,327
December	..	35	49	29	46	5,817	10,787	11,256	6,020	5,040
Total	..	101	149	190	221	45,500	103,670	139,860	81,690	76,495
Grand total, 1889-93	..	..	..	..	..	447,215				

NUMBER of Producing Wells in the Apsheon Oil Fields.

Month.	Number.				
	1889.	1890.	1891.	1892.	1893.
January	167	213	271	312	326
February	169	214	275	312	327
March	174	226	261	317	333
April	181	227	289	306	324
May	187	229	299	302	326
June	195	235	305	269	310
July	209	244	309	223	307
August	216	250	312	267	295
September	219	245	326	291	300
October	222	260	332	325	312
November	226	263	324	323	317
December	214	262	318	324	324
Total	278	356	458	448	472

TOTAL Amount of Crude Oil actually Pumped from Wells into Reservoirs from the Different Districts during the Years 1889-93.

District.	1889.	1890.	1891.	1892.	1893.
	Tons.	Tons.	Tons.	Tons.	Tons.
Balakhany	1,226,116	1,169,342	1,387,867	926,975	932,797
Sabountchy	1,687,986	2,163,919	2,446,207	2,495,760	2,359,495
Romany	...	24,939	269,162	661,968	1,179,780
Bibu-Eilat	296,667	290,760	385,286	536,498	766,044
Total	3,100,769	3,649,460	4,428,522	4,621,191	5,238,116

Annex G.—RETURN showing Quantity of Crude Oil actually Pumped into Reservoirs, Delivered to Refineries, and Stocks of Crude Oil at Wells at End of Each Month from 1889-93 inclusive.

QUANTITY OF CRUDE OIL ACTUALLY PUMPED INTO RESERVOIRS.

Month.	1889.	1890.	1891.	1892.	1893.
	Tons.	Tons.	Tons.	Tons.	Tons.
January	188,167	236,155	315,321	358,685	392,783
February	185,297	320,433	364,406	374,822	425,973
March	226,757	347,402	334,380	438,859	464,144
April	218,900	316,317	329,796	418,378	411,553
May	244,566	355,177	326,975	444,198	447,890
June	275,364	280,744	376,663	367,614	444,614
July	308,790	291,403	461,794	241,800	456,774
August	345,667	279,517	387,169	317,512	446,594
September	294,610	273,591	376,287	383,008	419,296
October	264,493	292,495	413,486	492,627	481,452
November	282,415	323,845	370,778	456,691	457,757
December	258,965	310,789	391,020	413,476	390,265
Total	3,100,761	3,649,473	4,428,517	4,621,190	5,238,116

QUANTITY OF CRUDE OIL DELIVERED AT REFINERIES FROM WELLS.

Month.	1889.	1890.	1891.	1892.	1893.
	Tons.	Tons.	Tons.	Tons.	Tons.
January ...	170,206	184,490	223,358	296,642	314,768
February ...	181,626	272,113	316,571	305,431	315,052
March ...	216,381	332,087	336,426	387,294	327,704
April ...	211,718	306,864	314,096	367,116	358,991
May ...	219,014	377,156	382,264	385,287	377,918
June ...	252,718	300,882	357,993	266,974	400,108
July ...	279,923	277,915	351,016	246,914	437,608
August ...	317,921	268,778	363,705	311,718	371,542
September ...	277,788	256,759	330,473	318,474	326,745
October ...	241,847	259,648	330,289	367,742	383,258
November ...	236,387	250,406	300,175	349,613	321,783
December ...	199,223	261,128	315,027	299,166	317,000
Total ...	2,534,752	3,348,226	3,921,373	3,901,366	4,252,472

STOCKS OF CRUDE OIL AT WELLS AT END OF EACH MONTH.

Month.	1889.	1890.	1891.	1892.	1893.
	Tons.	Tons.	Tons.	Tons.	Tons.
January ...		130,735	141,613	187,866	256,372
February ...		156,070	170,520	201,441	289,931
March ...		144,637	165,492	213,808	363,709
April ...		119,442	151,466	202,308	344,174
May ...		97,045	140,119	200,421	354,333
June ...		45,305	139,691	165,839	347,823
July ...	(*)	27,207	128,612	129,979	309,572
August ...		13,901	106,259	96,634	270,251
September ...		21,300	89,257	112,819	262,649
October ...		23,561	105,816	140,571	251,275
November ...		62,858	124,248	153,151	306,247
December ...	98,396	77,029	148,401	262,560	313,760

* No returns available.

Annex H.—RETURN showing Total Production of Crude Oil on the Apsheron Peninsula, and the Quantities Produced by Flowing and Pumping Wells during the Years 1889–93.

TOTAL PRODUCTION OF CRUDE OIL ON THE APSHERON PENINSULA (INCLUDING WASTE AND FUEL FOR PUMPING).

Month.	1889.	1890.	1891.	1892.	1893.
	Tons.	Tons.	Tons.	Tons.	Tons.
January ...	194,972	256,709	327,372	357,324	408,417
February ...	208,794	336,903	390,600	373,876	446,017
March ...	249,032	367,820	376,355	457,564	478,527
April ...	253,744	331,391	346,292	418,597	422,452
May ...	263,658	404,215	408,987	444,661	465,596
June ...	293,751	297,357	402,227	307,964	463,129
July ...	343,549	306,265	386,806	242,367	475,282
August ...	374,812	302,327	414,229	317,805	467,262
September ...	322,753	304,622	383,534	383,747	438,556
October ...	288,043	305,320	425,161	454,126	495,120
November ...	278,167	328,849	391,461	451,626	469,824
December ...	243,928	315,557	404,482	411,450	406,166
Total ...	3,315,203	3,857,335	4,657,506	4,621,107	5,436,318

PRODUCTION OF CRUDE OIL FROM FLOWING WELLS (EXCLUDING WASTE
AND FUEL).

Month	1889.	1890.	1891.	1892.	1893.
	Tons.	Tons.	Tons.	Tons.	Tons.
January ...	56,500	27,677	30,823	54,466	97,696
February ...	36,796	134,729	90,176	46,629	131,633
March ...	42,726	122,484	60,356	156,735	166,637
April ...	36,092	93,664	36,632	118,521	116,406
May ...	26,871	156,367	49,269	138,726	143,445
June ...	52,193	57,669	56,572	77,664	173,468
July ...	87,161	40,935	46,345	66,694	171,866
August ...	97,161	20,622	62,643	69,829	160,673
September ...	73,372	22,677	49,948	106,403	143,629
October ...	36,726	25,661	63,549	136,499	182,597
November ...	76,964	65,290	42,763	149,845	186,984
Total ...	666,006	902,330	631,929	1,221,330	1,762,560

PRODUCTION OF CRUDE OIL FROM FLOWING WELLS (EXCLUDING WASTE
AND FUEL).

Month.	1889.	1890.	1891.	1892.	1893.
	Tons.	Tons.	Tons.	Tons.	Tons.
January ...	131,667	208,778	264,499	394,136	292,380
February ...	148,489	183,709	271,230	311,893	291,276
March ...	187,031	226,725	292,627	368,124	297,467
April ...	182,808	229,896	299,374	299,378	301,622
May ...	217,696	229,896	345,765	368,472	304,129
June ...	223,170	223,675	322,462	236,549	284,719
July ...	221,539	241,669	325,423	181,107	251,149
August ...	251,516	249,694	324,526	243,663	286,671
September ...	221,239	250,901	326,414	276,864	255,627
October ...	227,678	266,733	349,938	318,824	288,306
November ...	209,431	268,556	328,016	366,847	279,773
December ...	196,490	274,853	356,329	313,557	299,862
Total ...	2,414,764	2,847,935	3,796,663	3,399,374	3,476,630

NOVOROSSISK.

The export trade of Novorossisk for the year ending December 31, 1893, in consequence of an abundant harvest shows a very considerable increase over that of the foregoing twelve months, the difference in the amount of grain shipped hence being 160,178 tons. Prices, however, were unremunerative to all concerned, commencing with the cultivator, who produced at a loss. The quality of the wheat by itself was good but the condition, generally speaking, left much to be desired, owing to the large admixture of rye and other foreign matter, thus it was principally shipped to the Continent and little found its way to home markets.

Elevators have been put up along the railway in the interior but have not as yet been used, and will, in all probability, be of little or no assistance, not being in keeping with local conditions and the customs of the population. In consequence of the want of roads, bridges, branches to the main line of the railway and the high rates and heavy charges exacted, added to the low standard

of the grain produced through the apathy of the cultivators, this part of Russia will, in the near future, be unable to compete with other countries in the sale of its grain abroad.

The Government is attempting to remedy the present state of things by issuing new regulations to be carried out by officials.

The stock of grain in the country is enormous, but there being no market it has, perforce, to remain on the land where it was produced.

Last autumn the Imperial Government, through the medium of local banks, advanced large sums of money on grain deposits, but instead of this money reaching the agricultural classes, that is to say, the producers, as was the original intention, the greater part of it found its way into the hands of local speculators or middlemen, and as prices have fallen steadily ever since, the loss suffered by the middlemen will be immensely greater than it would have been if the Government had not, by arranging these advances, enabled them to hold over their grain for an indefinite period. The result of these advances has been that several millions of poods, which might have been disposed of abroad at from 10 per cent. to 15 per cent. above the present nominal current rates on Continental markets, are still unsold, and it is highly probable that the private banks which advanced the money (lent to them by the State) to middlemen and cultivators will suffer considerable loss, as prices have fallen far lower than could have been anticipated, and will not now cover the amount so advanced, plus interest and the expenses of holding, &c.

On January 1 of this year there were about 208,000 tons of Stocks. grain available for shipment, but of this quantity some 160,500 tons have already left the country, there having been great movement in the port during the past two months.

The harbour works are progressing very satisfactorily, and will, Harbour works. in the general opinion, prove a success.

The railway elevator, although not yet in full working order, is Elevator. occupied in cleaning grain, and I am informed by the engineer-in-chief that some 600 tons are daily cleaned from three magazine elevators, 6 of which are now finished, two more awaiting completion. It is expected that in the month of May (old style) the elevator itself will be ready for work, but among practical commercial men there still appears to be a grave doubt as to the ultimate utility of this immense undertaking.

This line, some 170 miles in length, has been completed, thus Beslan-Petrovsk railway line. joining the Caspian Sea with the general network of Russian railways. It concerns the port of Novorossisk directly, inasmuch only that merchandise, such as sugar, manufactured goods, &c., will be forwarded hence to Central Asia, and that upon completion of the pipe line, between the lately discovered petroleum wells in the district of Grosny and the railway, the greater part of this produce will find its way to Novorossisk for exportation.

At the present moment reservoirs are being constructed here to hold some 2,500 tons of naphtha for the exclusive supply of the

locomotives and other machinery belonging to the railway company, most of which, I am informed, is now being adapted to burn naphtha residue instead of coal. A refinery, on a large scale, is also being built at Grosny, for the manufacture of petroleum, benzine, and all other kinds of illuminating, lubricating, and other oils, nearly all of which will in due course pass through Novorossisk. The daily output of oil at Grosny is estimated at about 5,700 tons and the stock now accumulated at about 90,000 tons. The wells are some 10 miles from the station of Grosny and transport is attended with great difficulty. It is reported that although the wells and fountains there are superior to those at Baku, this oil cannot compete with the Baku petroleum until the beforementioned pipe line be completed.

Population. The population of Novorossisk may now be fairly estimated at 25,600 souls.

Shipping. During the twelve months ending December 31, 1893, in all 962 steamers and sailing craft under various flags visited this port (see Annex A).

Quantities exported. The total amount of grain, seed, &c., exported hence during 1893 was 402,768 tons, of the value of 1,975,278*l.* (see Annex B), as against 242,590 tons, of the value of 1,539,349*l.*, during the previous year (1892).

Freights. The highest rate of freight obtained during last year was 14*s.* and the lowest 6*s.* 6*d.* per unit (new charter).

Coasting trade. Altogether 601 steamers and 111 small sailing craft, under Russian flag, entered from and cleared for other Black Sea ports, bringing 29,462 tons of cargo, consisting principally of salt (2,585 tons), planks and other wood (6,953 tons), coal (9,661 tons), kerosine (1,091 tons), bricks (1,350 tons), hardware (1,000 tons), cotton and wool (1,685 tons), and sugar (3,530 tons), the balance being made up of fruit, grain, and fish, the total declared value being 176,800*l.*, and taking hence 63,281 tons, consisting of cement (25,185 tons), flour (12,270 tons), grain (8,860 tons), planks and other wood (12,472 tons), tobacco (3,372 tons), and naphtha (1,124 tons), the total declared value being 248,800*l.*

Foreign goods imported. During the same period 6,393 tons of various merchandise, consisting of German cement (3,873 tons), tiles, fire and other bricks (440 tons), machinery (1,277 tons), hardware (481 tons), oranges and lemons (102 tons), and miscellaneous (220 tons), were cleared through this custom-house, the declared value being 25,300*l.*

Annex A.—RETURN of all Shipping at the Port of Novorossisk during the Year 1893.

ENTERED.

Nationality.	Number of Vessels.	Net Tonnage.	Horse-power.	Crews.
British	141	186,693	27,231	3,170
Russian*	712	544,890	..	..
Greek†	38	43,684	..	..
French	25	31,533	..	..
Danish	16	17,349	..	..
Italian	8	7,087	..	..
German	6	5,352	..	..
Austrian	3	3,025	..	..
Norwegian	2	2,484	..	..
Turkish‡	11	1,559	..	..
Total	962	843,656	27,231	3,170

CLEARED.

Nationality.	Number of Vessels.	Net Tonnage.	Horse-power.	Crews.
British	141	190,923	27,381	3,221
Russian*	712	544,890	..	..
Greek†	38	43,684	..	..
French	25	31,533	..	..
Danish	16	17,349	..	..
Italian	8	7,087	..	..
German	6	5,352	..	..
Austrian	3	3,025	..	..
Norwegian	2	2,484	..	..
Turkish‡	11	1,559	..	..
Total	962	847,886	27,381	3,221

* 111 sailing ships.

† 1 sailing ship.

‡ 10 sailing ships.

Annex B.—RETURN of Principal Articles of Export from Novorossisk during the Year 1893.

Articles.	On Steamers under British Flag.		On Steamers under other Flags.		Total.	
	Quantity.	Value.	Quantity.	Value.	Quantity.	Value.
Wheat	Tons. 163,415	£ 753,555	Tons. 111,448	£ 520,738	Tons. 274,863	£ 1,274,293
Seed	48,704	424,792	867	7,560	49,571	432,352
Barley	36,702	114,826	4,305	13,410	41,007	128,236
Rye	17,502	59,971	71	242	17,573	60,213
Oats	10,788	23,128	2,326	6,086	13,114	34,214
Maize	2,564	8,786	108	369	2,672	9,155
Oilcake	316	630	625	1,250	940	1,880
Tobacco	...	...	485	29,100	485	29,100
Staves	...	...	120	840	120	840
Ore	1,000	2,000	...	...	1,000	2,000
Hay	460	1,043	58	145	518	1,193
Tares	325	610	453	787	778	1,397
Bonemeal	...	...	127	395	127	395
Total	281,775	1,394,346	120,993	590,922	402,768	1,975,268

POTI.

Imports.

Our imports from abroad have of late years been so trifling as not to be worth attention. Owing to the recent tariff disagreements with Germany, French goods have somewhat supplanted German ones, but the Russian manufacturers now turn out most of the articles required for daily life, and are improving in their production.

Harbour.

A very good road is in course of construction between Poti town and the port, but nothing has been done yet to the port, although the recent serious fire at Batoum has again called attention to the projected removal of the petroleum business to Poti. It is highly desirable also that something should be done to our port independently of this, for further accidents have taken place to English shipping within the port during S.W. gales, and the passenger steamers of the Russian Steam Navigation Company pass by Poti without stopping whenever the sea is at all rough. Moreover, only three foreign-going steamers can load at one time in the port, and of these only two down to 18 feet. Several schemes have been propounded for the improvement of the port, but nothing appears definitely decided.

Manganese
and maize.

Manganese and maize continue to be our staple articles of export.

The Caucasian manganese appears able to compete with that of any other part of the world, and is largely shipped, not only to England and the Continent, but also to the United States. Last season did not, however, prove a profitable one to those engaged in the trade, partly on account of the drop in prices owing to the anticipated opening of the railway to the mines, partly because of bad trade in England and America. The new narrow gauge railway from Chiatur to Sharopan was opened during the autumn, but frequent landslips and the want of sufficient rolling stock have hampered its operations, and it does not appear probable that for some time it will be able to bring down nearly all that is mined. Ultimately the effect will be to divert the trade entirely from Kvirili, its present head-quarters, to Sharopan and Chiatur, the termini of the branch line.

Owing to low prices also the trade in maize has not been a satisfactory one, although the quality was up to the average. Last season's crop now beginning to be shipped is a little over the previous one, but the quality is a little affected by the rain in June and July.

Coal.

Of coal nothing worth speaking of is now brought down to the coast, though some is used for internal consumption as wood gets scarcer and dearer. In the accessible private forests the larger boxwood has been mostly cut down, the Government wisely does not desire that their forests shall in a few years be cleared of wood that takes hundreds of years to mature and place but little on the market. But substitutes from other parts of the world are taking the place of boxwood in the English market.

Boxwood.

Walnut wood also is not so abundant as it was. Large logs are Walnut wood.
only now obtainable in remote places difficult of access.

The wheat and barley grown inland all go for local consumption Wheat and
barley.
and the supply of the troops.

Much cotton comes through Poti from Persia, Bokhara, and Cotton.
Erivan, for shipment to Russia. Tobacco also goes to that destination.

From the coast to the north of Poti sleepers and staves are Sleepers and
staves.
exported, mostly to the Continent, but as several saw-mills have
been closed it does not appear to be so remunerative as might be
expected, seeing that splendid trees of oak, ash, &c., can be cut
down quite near the sea.

A branch railway has been begun from Michailovo Station on Branch
railway.
the main line to Borjom, a summer resort, and much frequented on
account of its mineral water baths. This will open out a well-
timbered valley, and may eventually be continued for military
reasons to Alexandropol and Kars. In that case it would communi-
cate with a large grain-producing district on the borders of Armenia.
The coast road northwards has employed many peasants sent from
the starving districts in Russia during last season, but not being
metalled yet it is not of much practical use.

Although cholera occurred again during the summer it was not Cholera.
so severe as in 1892, and the quarantine regulations being relaxed,
trade was not so much impeded by it as before.

Annexed are the returns of exports and imports during the
year.

RETURN of British and Foreign Shipping at the Port of Poti during the Year 1893.

ENTERED.

Nationality.	Sailing.		Steam.		Total.		Total, 1892.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.
British ..	..	..	75	88,532	75	88,532	86	115,040
Norwegian ..	..	..	4	4,354	4	4,354	1	1,290
Greek ..	..	..	3	3,311	3	3,311	5	4,422
Russian ..	..	..	1	782	1	782	..	..
Austrian ..	..	..	1	750	1	750	..	..
Swedish ..	..	..	1	1,120	1	1,120	..	..
German ..	..	..	1	1,099	1	1,099	2	2,160
French ..	..	..	1	1,250	1	1,250	2	2,790
Turkish ..	9	142	..	..	9	142	2	43
Italian ..	..	..	..	..	..	..	3	8,721
Total ..	9	142	87	101,798	96	101,940	101	129,521

(1733)

RETURN of British and Foreign Shipping at the Port of Poti during the Year 1893—continued.

CLEARED.

Nationality.		Sailing.		Steam.		Total.		Total, 1892.	
		Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.
British	..	..	..	75	88,532	75	88,532	86	115,090
Norwegian	..	..	..	4	4,954	4	4,954	1	1,290
Greek	..	..	..	3	3,311	3	3,311	5	4,422
Russian	..	..	..	1	782	1	782	..	..
Austrian	..	..	..	1	750	1	750	..	..
Swedish	..	..	..	1	1,120	1	1,120	..	..
German	..	..	..	1	1,099	1	1,099	2	2,160
French	..	..	..	1	1,250	1	1,250	2	2,790
Turkish	..	9	142	..	..	9	142	2	48
Italian	..	..	..	..	..	..	..	3	3,721
Total	..	9	142	87	101,798	96	101,940	101	129,521

BATOUM.

RETURN of the Principal Articles of Export from the Port of Poti
during the Years 1893-92.

Articles.	1893.		1892.	
	Quantity.	Value.	Quantity.	Value.
	Tons.	£	Tons.	£
Manganese	122,692	245,358	128,500	311,250
Maize	81,103	251,419	64,000	192,000
Seeds (various) ..	30	237	76	200
Wheat flour	12	144	11	110
Fish	5	30	10	200
Boxwood	149	1,490	..	..
Walnut-wood	476	4,760	470	3,290
Miscellaneous	274	548	300	600
Total	204,750	503,986	185,317	507,710

RETURN of the Principal Articles of Import to the Port of Poti
during the Years 1893-92.

Articles.	1893.		1892.	
	Quantity.	Value.	Quantity.	Value.
	Tons.	£	Tons.	£
Iron of all kinds ..	4	160	12	65
Skins	14			
Instruments	34			
Ropes	44			
Fish, &c.	44			
Oil	24			
Miscellaneous	44			
Total	244	160	12	65

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R U S S I A.

REPORT FOR THE YEAR 1893
ON THE
TRADE, &c., OF TAGANROG.

REFERENCE TO PREVIOUS REPORT, Annual Series No. 1234.

*Presented to both Houses of Parliament by Command of Her Majesty,
MAY, 1894.*

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1299. Dantzic	7d.	1360. Marseilles	1½d.
1300. Sofia	2½d.	1361. Brest	1d.
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1302. Paris	1d.	1363. Suakin	1d.
1303. Buenos Ayres	½d.	1364. Callao	1d.
1304. Tangier	2½d.	1365. Pirmas	2d.
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Reference to previous Report, Annual Series No. 1234.

R U S S I A .

TAGANROG.

Consul Talbot to the Earl of Kimberley.

My Lord, *Taganrog, April 28, 1894.*

I HAVE the honour to transmit herewith my Annual Report on the Trade and Commerce of this Consular District for the year 1893, together with Reports from the Vice-Consuls at Kertch, Berdiansk, and Rostov-on-Don, and the Consular Agent at Ghenichesk, for their respective districts.

It appears to become yearly more difficult to obtain correct information, and rather than delay further the transmission of this Report, I must leave the reports on Iron and Steel Industries, Salt, &c., to a further occasion.

I have, &c.
(Signed) C. A. P. TALBOT.

*Report on the Trade and Commerce, &c., of the Consular District
of Taganrog for the Year 1893.*

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The trade and commerce of Taganrog, which has been of a Trade and commerce. very dull and disappointing character during the year 1893, depends almost entirely on the state of the grain market, very little business except that in cereals being carried on, and, of course, retail businesses are dependent on the wholesale, and suffer or rejoice with them. This part of Russia, being almost wholly under corn cultivation, also as a matter of course depends mainly on the state of the grain market for its prosperity or its misfortunes. Rostov-on-Don, a very large and increasing town, 3 hours by rail from Taganrog, where an immense deal of business is done, is very differently situated, though a vast quantity of grain, coming from the eastern provinces and the Caucasus, is also dealt with there, has many other resources to fall back upon, and contains ironworks and foundries, shipbuilding yard, wool washeries, tobacco manufactories, many agricultural machinery, dépôts, flour mills, &c. It is, therefore, not so dependent on the grain trade for its prosperity.

Prices for grain were fairly moderate at the commencement of 1893, until the prospects of the harvest were known to be so very hopeful, and an abnormally abundant harvest was prophesied, and this had naturally a tendency to the lowering of prices. Other causes assisted in keeping them at a low figure, and one main reason was the tariff war between this country and Germany, which almost paralysed the trade with the latter.

The stocks from last year of grain and seed at Taganrog and Stocks. Rostov-on-Don may be computed as follows at the commencement of the season:—

Articles.					Quantity.
					Quarters.
Hard wheat	..	..	..	..	256,320
Ghirka	..	..	..	..	167,400
Azima	..	..	..	..	272,160
Rye	..	..	..	..	92,000
Barley	..	..	..	..	680,122
Oats	..	..	..	..	36,137
Linseed	..	..	..	..	8,619
Rapeseed	..	..	..	..	16,150
Cress seed	..	..	..	..	14,025
Maize	..	..	..	..	350
Total	..	..	..	..	1,543,293

Besides these quantities there were 1,488 tons of flour, and about 15,000 qrs. of different kinds of grain.

These stocks are, of course, enormous, and I do not know that the quantity has ever been surpassed. It is accounted for by an abundant harvest and no buyers.

As regards the principal articles of export, the return would Exports. have shown a much larger result if the prices of grain ruling during the year had not been so adverse all through the season, (1762)

for there is a decided increase in the quantities exported but not a proportionate increase in the total values, although that does show a balance in favour of 1893, as compared with 1892, of 1,226,041*l.* The articles showing the largest amount of increase are wheat, 883,345 qrs.; barley, 819,116 qrs.; rye, 282,882 qrs.; and linseed, 30,918 qrs.; but rapeseed falls off to the extent of 17,115 qrs., as also does wool, 3,575 tons. The total value of exports in 1893 was 4,637,256*l.*; in 1892, 3,410,615*l.*

Imports.

As compared with 1892, imports show an increase of nearly 203,000*l.* In 1893 the figures were 530,021*l.*, and in the first-named year 339,064*l.* On referring to Annex B it will be noticed that nearly every article shows an increase in the quantity imported. The exceptions are dried fruits, Halva olives, and wine, and they do not show any very marked decrease. On the other hand, the imports of tea have increased by more than 16,000 lbs. and 38,311*l.* in value, and tobacco by the substantial amount of 272,140 lbs. and 51,394*l.* in value.

Exchange.

The rate of exchange on 3 months' bills has not varied very much during the past year. The highest point the rouble touched was 9.31 r. to the *l.* in the month of December, and the lowest in January, 9.81½ r., and it fluctuated between these figures during the year. 9.50 r. is the average exchange for the whole year, and on this the various calculations in this report are based.

Shipping and navigation.

The navigation was declared officially open on April 3, and it closed on December 9.

Lightships.

The lightships at the roadstead were moored and removed in good time, and no complaints were received from the masters of vessels in regard to them.

British shipping entered.

A larger class of steamer for the carrying of grain is now arriving in the Azoff, some being specially built for the trade.

During the past year the largest steamer which had ever been entered at this port, the steamship "Westburn," of 2,112 tons net register, arrived in the roads, and was run very close by the "Penarth," of 2,016 tons register. The average net register tonnage of British steamers arriving was 1,267 tons for the year.

The number of British vessels entered and cleared from this port during the year reached 249. Of steamers 248, and one sailing vessel from Malta, the only sailing vessel under the British flag which has entered the port since 1889. The above figures show an increase, as compared with 1892, of 82 vessels, with an aggregate register tonnage of 314,648 tons, as against 187,718 tons in 1892, or an increase of 126,600 tons. This increase would, no doubt, have been much greater if business during the year had been more brisk.

19 British steamers, of 23,419 tons, arrived with cargoes—8 direct from the United Kingdom, with cargoes valued at 37,000*l.*; 9 from Russian ports, value 57,000; 1 from America, cargo value 48,882*l.*; and 1 from Italy, value of cargo 15,700*l.*

In ballast 33 steamers entered from the United Kingdom, and 1 sailing vessel from Malta, of 43,527 aggregate tonnage; 113 steamers arrived from Italy, of 142,584 tons; 23 from Egypt, of

35,089 tons; 20 from France, of 25,287 tons; and the balance of 40 steamers, of 57,786 tons, arrived from other countries.

During 1893 249 British vessels cleared from this port, with ^{Cleared.} cargoes valued at 2,774,596*l*. Of this number 128 cleared direct for Great Britain, Malta, or Gibraltar for orders; of the remaining number 49 cleared for Russian ports, to fill up the balance of their cargoes loaded here, the total value of which on leaving Taganrog Roads was 540,986*l*. For France 19 steamers cleared; cargoes valued at 227,589*l*. For Italy 17 steamers cleared; cargoes valued at 234,581*l*. The balance of the steamers cleared for other countries and their cargoes were valued at 298,368*l*. Five steamers only cleared in ballast during the year, all for Russian ports.

Foreign shipping also shows an increase in 1893 as compared ^{Foreign} with the previous year. 550 vessels, of 283,046 tons, entered, as ^{shipping.} compared with 358 vessels, of 167,742 tons, an increase of 692 vessels and 115,304 tons. In 1892 127 foreign steamers, of 104,050 tons, and 231 sailing vessels, of 63,692 tons, arrived at Taganrog. In 1893 201 steamers, of 184,281 tons, and 349 sailing vessels, of 98,765 tons, or an increase of 74 steamers and 118 sailing vessels.

In British and foreign shipping the total tonnage in 1893 ^{Total British} amounted to 597,664 tons and 799 vessels, as against 355,460 tons ^{and foreign.} and 525 vessels in the previous year, showing an increase of 242,204 tons and 274 vessels.

During the past year 1,756 steamers and 185 sailing vessels, ^{Coasting} or 1,941 vessels, measuring 352,768 tons, arrived at Taganrog ^{trade.} from Russian ports, their cargoes consisting of grain, salt, fish, timber, iron, &c., amounting to 25,576 tons.

The departures during the same period consisted of 1,783 steamers and 183 sailers, making a total of 1,966 vessels, of 369,632 tons, the cargoes of which were principally composed of grain, coal, &c., amounting to 10,735 tons.

The above figures do not, of course, include the vessels engaged in the trade between this port and the roadstead.

In 1893 there were two cases of steamers dragging their ^{Collisions.} anchors and drifting on to barges, &c., causing some damage and considerable expense. I understand that both these steamers had used patent anchors, and I am also informed that in the Sea of Azoff this class of anchor is of very little service, especially in an open roadstead like that of Taganrog, when the wind blows strong. They no doubt are very serviceable on a good hard bottom, but the bottom of the Sea of Azoff is mud and sand. In a strong wind the vessel keeps jerking against the anchor, which gradually loosens the ground round it, and eventually the anchor is dragged out with the surrounding mud and sand. The patent anchor, therefore, according to the opinion of Lloyd's agent, is not adapted for anchoring in this roadstead.

Freights during the season of 1893 were more or less ^{Freights.} stationary, with slight fluctuations, and it was only towards the close of the navigation that rates began to be excited, and as high as 20 fr. direct Antwerp was paid.

The rates for first open water were quoted at 13*s.* usual charter, and 12 fr. 50 c. to 13 fr. to the Mediterranean. In April there was a slight drop, and boats could be chartered at from 12*s.* to 12*s.* 6*d.* usual charter, 11 fr. 50 c. to 12 fr. Mediterranean; but towards the end of the month, owing to the good demand for Italy, rates went up to 13 fr. 50 c., and even 14 fr. was paid. May and June passed without any change, but towards the end of the latter month freights weakened, and 11*s.* 9*d.* United Kingdom and 11 fr. 50 c. Mediterranean were accepted. In July quotations further dropped, and 10*s.* 9*d.* and 11*s.* were paid, berth steamers accepting even as low as 10*s.*, and one steamer filled up at 9*s.* 6*d.* for London. With the appearance of the new crops rates hardened, and business was done at 12*s.* to 12*s.* 6*d.* usual charter, 11 fr. 50 c. to 12 fr. Mediterranean. During September rates fluctuated between 14*s.* and 15*s.* 6*d.* United Kingdom, and 12 fr. 50 c. to 16 fr. Mediterranean, berth rates being about 14*s.* to 14*s.* 6*d.* to London, Hull, Rotterdam, or Antwerp, and the firm tendency continued quite up to the end of the season, the rates during October being 16*s.* and 15 fr. Mediterranean. In November 16*s.* 6*d.*, 17*s.* 6*d.*, and in one case 20*s.* was paid for a small prompt steamer.

The berth business, owing to the great facilities it affords to merchants, is rapidly gaining ground and is taking quite an important part in the trade of this port.

Barge rates.

There was very little fluctuation in the barge rates from Rostov-on-Don to the roadstead during 1893. The general rates were 10 c. to 20 c. per chetwert (1*s.* 5*d.* to 2*s.* 10*d.* per ton), but towards the end of the season, owing to low water in the mouth of the Don and an accumulation of steamers in the roadstead, the freights rose to 40 c. and 50 c. (5*s.* 6*d.* and 6*s.* 9*d.* per ton), and in one or two instances even 10 c. more were paid.

There are a large number of barges available both at Taganrog and Rostov, and under usual circumstances the supply fully meets the demand.

Industries. Agriculture.

The harvest of 1893 can be safely stated as above the average, though of course the yield of the different crops in different provinces, so widely apart, and so widely dissimilar in climate cannot be of equal quantity. As a rule, however, in nearly all the provinces of this consular district the weather at the beginning of the year was cold and rainy till about the middle of July, and this was succeeded by great heat and drought, in some parts accompanied by strong easterly winds, which shrivelled up the growing corn. In Ufa and Orenburg, sharp frosts also set in as late as the end of July, which naturally did considerable damage to the crops.

The harvest, though above the average, cannot be said to have been a lucrative one to either growers or buyers. The quantity was certainly great, but the quality of the grain was poor and light. The prices abroad ruled so low that there was scarcely any market, and therefore those who were compelled to sell did so at a loss. Those who were able to do so have held on in the hopes

of obtaining better prices, which at present are not likely to be realised, hence the great stocks of grain not only in the different ports and towns, but at the homesteads themselves, where there is said to be a large quantity of the extent of which no correct estimate can be made.

The Government in the autumn, in order to aid the poorer classes of the holders of grain, as the rents for grain stores on account of the large stocks had risen to double the ordinary rate, caused temporary storehouses to be erected in which their grain could be stored till better times arrived, and on the quantity thus stored the proprietors were allowed to borrow money from the Government banks at a low rate of interest.

Locusts appeared in parts of the Kuban territory last summer, not the large kind but a smaller sort, which, though perhaps not so destructive, do an immense deal of damage. It is feared the plague will appear again this year, as of course great quantities of eggs were deposited. In these districts and in Ekaterinoslav there has been a great plague of mice which have destroyed a large quantity of grain stored in the different granaries.

The following table shows the average yield per acre in bushels of the various kinds of grain in the different provinces of this consular district:—

Provinces.	Quantity.				
	Winter Wheat.	Spring Wheat.	Rye.	Barley.	Oats.
	Bushels.	Bushels.	Bushels.	Bushels.	Bush.
Don Cossack territory	14	16	11	30	24
Ekaterinoslav	7	13½	11	24	27
Kuban territory.. ..	13	12	12	20	24
Ter territory	16	16	10	16	14
Stavropol	18	18	8	20	22
Astrakan.. ..	..	4	3	6	5
Voronej	14	15	13	20	23
Saratov	12	10	11	13	19
Samara	..	11½	15	10	18
Ufa	..	11	18	12	27
Orenburg.. ..	..	18	18	12	20

The hay crop taking the whole of the consular district was a very satisfactory one, the quantity was large and the quality was good. Owing to the drought in France last year and the partial failure of the hay crop in that country, contracts were made in these parts to ship some cargoes of hay to Marseilles for the French Government. Some other outside business was done in purchasing hay for exportation, but I do not think the results were satisfactory.

Potatoes and other vegetables as a rule produced a good crop in 1893, with the exception of in the province of Orenburg. Fruit, owing to the cold spring and in some parts late frosts, was

a failure on the whole. The only average yield was in the Kuban territory.

Labour.

Labour seems on the whole to have been plentiful, and rates of wages moderate. In some provinces the supply exceeded the demand, but the opposite was the case in Ekaterinoslav.

Fisheries.

The result of the fishing in the Sea of Azoff during the past year owing to the unfavourable weather which frequently prevailed, cannot be said to be above the average. The most favourable time for the so-called "red fish," viz., the three different kinds of sturgeon, osetrina, sevringa, and beluga, is in May and September, and the best catches of white fish, soudak, bream, and carp, were made in July and November.

The total quantities that passed through this port during 1893 were as follows:—

	Quantity.	Value.
	Cwts.	£
Sturgeon	41,660	92,000
Soudak, carp, and bream	200,000	158,000
Black caviare	2,000	50,000
Red caviare	41,600	44,450
Total	..	344,450

Of the above quantities very little is retained for local consumption, and the greater part is sent away by railway sometimes in a frozen state. Annually about 33,330 cwts. of sturgeon are despatched to Moscow, and the bulk of the white fish finds its way in a fresh or salted state to Warsaw and the Vistula provinces.

Red caviare is principally exported to Turkey and Greece; Taganrog serving at the same time as an outlet for that article from the Astrakan and Volga.

The prices during the past year varied as follows: osetrina, 2*l.* to 3*l.* 10*s.* per cwt., sevringa, 1*l.* 2*s.* to 2*l.* 12*s.* per cwt., beluga, 1*l.* 15*s.* to 2*l.* 12*s.* per cwt., soudak, 15*s.* to 1*l.* 10*s.* per cwt., bream and carp, 6*s.* to 16*s.* per cwt.

Agricultural machinery.

The trade in agricultural machinery on account of the abundant harvest was extremely satisfactory during 1893. In some cases the demand for the different classes of machines exceeding the supply, and most of the stores were pretty well sold out of the stocks before the end of the season.

As is usually the case, the engines and steam threshers were of English make, and there was a large increase in the sale of these. Reapers and binders were imported from America, and also about half the drills, the other half being of Russian make. A large number of Russian mowers were used this year for cutting hay, being well suited for the purpose to the detriment of American mowers. The trade in ploughs in 1893 was much the same as in the previous year, the larger amount of those sold being of Russian manufacture.

It has proved impossible to get any very detailed information Tobacco. as regards the tobacco crop of 1893, but there appears to have been an increase in production as compared with 1892, in spite of the fact that there were fewer plantations and a smaller number of acres under cultivation. According to the official statistics, in the whole of Russia, not including Siberia, there were in 1893, 619,358 tobacco plantations farming 143,461 acres against 667,726 plantations and 148,616 acres in 1892, and the harvest in 1893 showed a total of 79,663 tons against 73,804 tons in 1892, or an increase of 5,859 tons.

In the provinces appertaining to this consular district, 27,450 acres were under tobacco cultivation during 1893 in the Kuban territory, producing 11,233 tons; in Samara 6,608 acres, produced 2,572 tons; in Taurida, 7,684 acres, and 2,560 tons; and in Voronej 3,852 acres, yielded a crop of 2,516 tons.

The past year, as was the case in 1892, was remarkable for Coal. the large demand for mineral fuel, and it was with great difficulty that the Russian collieries could keep up the supplies, notwithstanding their rapid development and the largely increased annual output. The scarcity of coal was remarked as far back as December, 1892, and many of the most important consumers, such as the ironworks, had not received the quantities ordered. In this manner 1893 began with a deficiency, which must be put down to the absence of stock at the collieries, notwithstanding that the output of coal during 1892, in the Donetz Basin, amounted to 3,452,900 tons, as against 3,042,200 tons in 1891, or an increase of 410,700 tons. In 1883 the output of coal in the Donetz Basin was 1,703,450 tons, and therefore in 10 years the production has been more than doubled. The figures for 1893 have not yet been published, but it can safely be said that the production for the year will show a further increase, and as a proof of this, it is only necessary to give the quantities carried by the different railways, viz. :—

Railways.					Quantity.
					Tons.
Kursk-Kharkov-Azoff line.	..	..	..	..	1,137,105
Ekaterina line	..	..	..	..	1,063,419
Donetz	..	..	..	..	365,719
Voronej	..	..	..	..	91,154
Total	..	..	..	..	2,657,397

The figures for 1892, as mentioned in my annual report last year, being for the same railways, 2,526,801 tons.

Not speaking of the other coal-fields of Russia, the Donetz Coal Basin, with the foreign coal and coke imported into the country 1,624,800 tons and 272,380 tons respectively, supplied the market with 4,554,577 tons of fuel, or an increase of 441,032 tons. At the same time it must be remembered that the use of naphtha

refuse is also rapidly increasing, and in 1893 some 450,000 tons more were used than in the previous year.

Notwithstanding the above-mentioned increase in the production of mineral fuel, the deficiency noted at the beginning of 1893 was felt throughout the season, thus sustaining prices and giving a firm tone to the southern coal markets, which lasted with little fluctuation during the whole year. This was the cause of two of the ironworks in the district reducing their activities in the early part of the season. The general causes of this difference between the supply and the demand may be said to be principally the extraordinarily rapid development of metallurgical industry in these parts, and also in a minor degree to the publication of the law for the preservation of forests, which curtails the supply of firewood, and its natural replacement by coal. At the same time, the working of the coal meets with great drawbacks, owing to the absence of permanent miners and difficulty in obtaining working hands, also the stoppage of traffic during the winter, owing to the railways being blocked with snow, and other minor circumstances, which all tend to put obstacles in the way. To add to these difficulties, in the spring, owing to the abundant rains, several of the mines were flooded and work was stopped for some time. Again in the autumn, numbers of workmen left the mines to work at the plentiful harvest, so that prices of labour rapidly rose, and the stocks of coal at the collieries and the railway stations gradually diminished.

Anthracite.

A fire raged during the summer at some large anthracite coal mines, belonging to a Mr. Koshkin, and as a consequence work had to be ceased, and this was a principal reason of the rise of prices in coal during the autumn and winter.

Several of the railway companies and other large consumers have petitioned the Imperial Government to take off the duty on foreign coal, or at any rate to diminish it, but I should doubt if their petition would be granted.

Cattle plague.

The cattle plague in this consular district during the year 1893 prevailed to a much greater extent than in the previous year, the total deaths, died and killed, in one province alone, that of Stavropol, being 10,000 more than those which took place in all the 11 provinces last year.

The disease was most prevalent in the southern provinces of the consular district, the most affected being the afore-mentioned Stavropol with 64,002 total deaths and killed, the Don Cossack territory with 31,917, and the Kuban territory with 19,430, Ekaterinoslav further to the north-west of these provinces also suffered considerably, showing a total of 11,897 died and killed. In the north-eastern provinces, Saratoff, Samara, and Ufa not a single case was reported during the whole year. In Voronej there were 456 deaths occurred up to the month of May, the disease then died out till the month of December, when 138 deaths were reported. The province of Orenburg was free till the month of October, and from that date till the end of the year

808 animals died and were slaughtered. The total number of animals that died in the 11 provinces during the year was 89,105, 47,848 were killed, making together a total of 136,953 as against 54,200 last year.

TABLE showing the Loss of Cattle from Cattle Plague in the Consular District of Taganrog during the Year 1893.

Provinces.	Died.	Killed.	Total.
	Number.	Number.	Number.
Ter territory	5,562	23	5,585
Kuban territory	19,199	231	19,430
Stavropol	49,996	14,036	64,002
Astrakan	131	2,589	7,720
Ekaterinoslav	6,990	4,906	11,897
Don Cossack territory ..	7,089	24,828	31,917
Voronej	141	453	594
Samara	..	..	..
Saratoff	..	..	..
Ufa	..	..	..
Orenburg	26	782	808
Total	89,105	47,848	136,953

This branch line was completed last year and is now open to traffic. The well-known Caucasian health resorts where many people from all parts of Russia repair to during the summer months, Piatigorsk, Essentuki, and Kislovodsk, will benefit considerably, and it cannot but prove to be a profitable undertaking. Public works.
Railways.
Mineralni-
Vodi-
Kislovodsk.

The plans of this line having been approved of by the Imperial Government, the necessary surveys are being taken and the earthworks will soon be commenced. The line starts from Kavkaskaia station on the Vladikavkaz Railway to Stavropol, the capital town of the province of that name. Stavropol
line.

The Petrovsk Railway was opened during the winter, and the traffic both in passengers and goods is already great. This line besides serving as a direct communication between European and Asiatic Russia opens up a large tract of fertile lands through which the line runs, and also furnishes an outlet for large deposits of naphtha which have been found to exist in the vicinity. It is expected that petroleum from these wells will very soon find its way to the Black Sea via Novorossisk and successfully compete with the Baku oils in foreign markets. Petrovsk
line.

This line which I mentioned in my annual report for the year 1890 as being of considerable importance, both commercially and strategically, as the shortest route from the eastern provinces of Samara, Saratov, &c., and affording facilities for the conveyance of troops from the military centres of Moscow and Kazan to the south-western provinces, is making very rapid progress towards conclusion, and will be very soon open for traffic. Kursk-
Voronej line.

Taganrog
harbour.

Contrary to expectations the dredging operations were not completed by the end of the navigation, and a large portion still remains to be worked inside the harbour, to say nothing of the proposed channel to be dredged to the Cherepaka Telet, about $\frac{1}{2}$ mile distant, and to which nothing has been done up to the present. The entrance to the harbour also requires further dredging as there is less depth of water there than in the harbour itself. Dredging was, however, carried on energetically enough during the summer by two dredgers. During their operations many old curiosities were brought to light, gold, silver, and copper coins of the time of the Empress Catherine, skulls, spherical iron shells still charged with powder and with wooden plugs, stone cannon balls, bar and chain shot, pieces of old cannon, &c.

The masonry is almost completed and little remains to be done, a part of the wall on the north side of the old harbour has given way, however, and will require rebuilding. The space between the walls of the southern mole is being rapidly filled in with rubble and should be soon open for traffic.

Up to the present nothing has been done towards the construction of warehouses, but the question has been brought to the notice of the Imperial Government, and hopes are entertained that the project will soon be realised.

Part of the land adjoining the port has been allotted for coal and petroleum stores, and it is reported that some of the principal coal exporters intend to ship their goods from Taganrog instead of from Rostov.

Public health.

The health of Taganrog during the year 1893 may be considered, on the whole, as satisfactory, and with the exception of the existence of the cholera epidemic, no disease of an unusual character prevailed. The cholera epidemic itself could not be compared to that of last year, as far as the number of deaths went, though certainly the percentage of deaths to cases was higher than the year before. Yet no extraordinary precautions were taken by the authorities, and the inhabitants seemed quite callous.

Mariupol.

Port.

Nothing further has been done to this port during the year 1893, and the various improvements proposed have not got beyond the preliminary stage. It is to be hoped, however, that something will be done in the near future to keep an even depth in the port, otherwise even the smaller steamers will not be able to take in full cargoes at the quay.

Coal.

During the past year 195,238 tons of coal were shipped from the new port to the Black Sea and Azoff ports, and 3,175 tons were despatched to Constantinople. The exports to that city would have been larger, but the quarantine of 10 days imposed by the Turkish Government on arrivals from the Azoff completely put a stop to the trade, and the shipments were limited to two

steamer cargoes early in the season. It is proposed to make another trial in the spring, and if nothing unforeseen occurs the exports promise to be very large.

The rock salt from the Bakhmut mines finds a ready sale in Salt. the Black Sea ports, and during 1893, 4,000 tons were shipped to Poti and Batoun.

The imports during 1893 consisted of machinery, cement, fire- Imports. bricks, and fireclays, amounting to 13,200 tons, valued at 264,000*£*, as against 1,355 tons and 26,700*£* in 1892. The articles in question came from Great Britain and Antwerp, and were destined for the various iron foundries, &c., established in the Donetz Basin.

The exports during 1893 more than doubled those for the Exports. previous year in quantity, although the value of the same has not proportionately increased to the same extent, owing to the usual reason, the low price of grain in the autumn. The shipments of grain and seed amounted to 1,147,184 qrs., valued at 1,100,406*£*, as against 539,841 qrs. of 508,827*£*. during the previous year. Coal also shows an increase of 1,800 tons and 1,189*£* in value, but staves have disappeared from the list of exports.

The arrivals at Mariupol during 1893 consisted of 29 sailing Shipping. vessels of 10,150 tons, and 119 steamers of 135,151 tons, making a total of 148 steamers of 145,301 tons. The total figures for the previous year were 79 vessels of 69,492 tons, or an increase in favour of 1893 of 69 vessels and 75,809 tons. The bulk of the trade was again in the hands of the British flag, which headed the list with 87 steamers and 102,888 tons, or more than doubling the previous year's figures, which stood at 42 steamers and 43,979 tons. The Greek flag with 29 sailers and 12 steamers of 21,944 tons comes next, and the balance is made up by Norwegians, Italians, and other nations.

The stocks at Mariupol at the end of 1893 consisted of Stocks. 23,040 qrs. hard wheat; 85,630 qrs. soft wheat; 9,520 qrs. rye; 142,892 qrs. barley; 280 qrs. linseed; and 6,570 qrs. rapeseed; the same being about equally held by merchants and speculators.

Yeisk.

The municipality are still occupied with the plans, surveys, Railway &c., of the proposed branch line to the Koushevka Station, on the Vladikavkaz line, but, up to the present, nothing definite has been arranged, and some time must yet elapse before work can be begun. Railway
communica-
tions.

The same may be said of the proposed new port respecting New port. which nothing further is heard.

Yeisk does a large business in cattle, horses, fish, hides, tallow, Trade &c., with which it supplies the neighbouring towns, but of late the trade in cattle has been very limited, owing to the quarantine regulations imposed by the authorities on account of the existence of the cattle plague, which seldom leaves this part of the Kuban territory.

Agricultural machinery. It is difficult to arrive at the correct figures, but, roughly speaking, the value of agricultural machinery sold at Yeisk during the past year was not far off 50,000*l*.

Agriculture. The area of land, generally sown in the Yeisk district, is about 1,620,000 acres, and that under grass extends over about 1,080,000 acres. The harvest in this district in 1893 may be said to have been an average one, but the quality of the grain left much to be desired.

Imports. Yeisk has no direct import trade with foreign countries, all supplies being received from Taganrog or Rostov.

Exports. The exports again show an increase as regards quantities, but the values for the same causes as before-mentioned only show an increase of 15,374*l*. The shipment of grain and seed amounted to 767,869 qrs., valued at 554,914*l*., as against 627,801 qrs., and 534,518*l*. in the previous year. Oilcake shows an increase of 961 tons, and 2,218*l*. in value; but wool, on the other hand, has decreased by 115 tons and 7,241*l*. value.

Shipping. During 1893, 48 vessels of 21,526 tons entered the port of Yeisk. Of the above, 35 were sailing vessels of 8,436 tons, and 13 steamers of 12,090 tons, which, notwithstanding the increase in exports, shows a falling-off, as compared with the previous year of four steamers and 5,908 tons; but in sailing vessels there is an increase of seven, and 2,206 tons. The above must be attributed to the fact that most of the exported grain is shipped on board lighters and despatched to Taganrog or Mariupol roadsteads.

The stocks at Yeisk, a third of which is in the hands of speculators early in February, 1894, were as follows:—hard wheat, 137,880 qrs; azima, 155,400 qrs.; ghirka wheat, 10,440 qrs.; barley, 136,290 qrs.; and rapeseed, 6,800 qrs.

Temriuk.

The trade of Temriuk is not in a very flourishing condition, and since the opening of the Novorossisk Railway it has completely lost its importance as the outlet for the produce of the Kuban territory. Besides this, the position of Temriuk, and the difficulties attending shipments owing to the shallowness of the water, &c., all tend to drive away trade, and if something is not soon done to improve the mouth of the River Kouban and other important measures, Temriuk will completely disappear from the number of exporting ports in the Azoff.

Exports. The exports of 1893 more than doubled those of the previous year, the values of the same standing at 83,294*l*. and 41,716*l*. respectively. The exports of grain were 102,502 qrs. valued at 83,294*l*., against 39,080 qrs. and 37,868*l*. in 1892. The shipments of wheat and barley showed a great improvement, but rye, on the other hand, declined from 26,420 qrs. in 1892 to 14,072 qrs. in 1893.

The shipments to Kertch and other Russian ports during

during 1893, were: wheat, 28,392 qrs.; rye, 9,976 qrs.; and barley, 11,363 qrs., besides a large quantity of oilcake and raw goods.

Temriuk does not import foreign goods direct from abroad. Imports.

The harvest of 1893 was above the average for wheat and rye, Agriculture. and the barley crop was also fairly good. Owing to prevailing low prices and limited demands for grain, the supplies were very small in the autumn, and the stock of grain in the interior must still be great.

The winter sowings were rather limited, but the aspects of the same up to the present are very favourable.

During 1893, 12 steamers of 11,980 tons, and 1 Russian sail- Shipping. ing vessel of 80 tons entered the port of Temriuk. Of these, 9 steamers, of 9,254 tons, were British, and the balance was made up of Greek, Italian, and Austrian nationalities.

The stocks at Temriuk, early in 1894, were as follows:— Stocks. Wheat, 2,880 qrs.; barley, 24,780 qrs.; rye, 6,400 qrs.; and about 2,000 tons of oilcake.

Annex A.—RETURN of all Shipping at the Port of Taganrog during the Year 1893.

ENTERED.

Nationality.	Sailing.		Steam.		Total.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.
British	1	300	248	314,318	249	314,618
Russian	10	986	...	...	10	986
Greek	299	89,719	118	107,062	417	196,781
Italian	9	3,733	41	36,256	50	39,989
Norwegian	...	...	16	19,776	16	19,776
Austrian	...	...	19	12,602	19	12,602
Turkish	31	4,327	1	1,206	32	5,533
Other flags	...	...	6	7,379	6	7,379
Total	350	99,065	449	498,599	799	597,664
„ for the year preceding	231	63,692	294	291,768	525	355,460

CLEARED.

Nationality.	Sailing.		Steam.		Total.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.
British	1	300	248	314,318	249	314,618
Russian	10	986	...	...	10	986
Greek	299	89,719	118	107,062	417	196,781
Italian	9	3,733	41	36,256	50	39,989
Norwegian	...	...	16	19,776	16	19,776
Austrian	...	...	19	12,602	19	12,602
Turkish	31	4,327	1	1,206	32	5,533
Other flags	...	...	6	7,379	6	7,379
Total	350	99,065	449	498,599	799	597,664
„ for the year preceding	231	63,692	294	291,768	525	355,460

**Annex B.—RETURN of Principal Articles of Export from Taganrog
and Rostov-on-Don during the Years 1893-92.**

Articles.		1893.		1892.	
		Quantity.	Value.	Quantity.	Value.
Wheat	Quarters	2,341,757	2,371,856	1,658,412	2,368,426
Rye	"	281,528	231,288	81,889	57,867
Barley	"	1,671,691	994,173	892,185	518,793
Oats	"	5,777	3,555	3,428	3,262
Maize	"	1,876	1,871	878	881
Linnseed	"	39,328	69,120	8,862	18,174
Rapeseed	"	36,177	26,765	33,125	32,135
Lard	Tons	1,226	79,680	1,237	33,744
Caviare—					
Red	"	1,567	31,943	1,222	27,483
Black	"	97	19,926	63	16,889
Flour	"	124	1,920	165	2,398
Onion	"	1,729	6,865	1,764	2,388
Linseed	"	1,361	34,689	948	29,598
Wool	"	1,560	38,337	5,395	368,829
Other articles	"	—	14,415	—	11,588
Total			4,667,256		3,410,915

NOTE.—The scale of conversion of Russian measurements, of 40 pounds, to English imperial quarters has been as follows:—Wheat and maize, 75 per cent.; rye, 80 per cent.; barley, 85 per cent.; oats, 122·5 per cent.; linseed and rapeseed, 85 per cent. 63 pounds = 1 ton. Exchange: 9 sh. : par £1 sterling.

**RETURN of Principal Articles of Import to Taganrog during
the Years 1893-92.**

Articles.		1893.		1892.	
		Quantity.	Value.	Quantity.	Value.
Capees	Tons	3,481	11,543	1,764	26,007
Cheerups	"	433	4,061	197	2,811
Drum	"	45	1,353	299	6,925
Press	"	5,164	6,061	3,389	87,371
Flax	"	167	1,096	226	3,581
Ironware	"	199	1,630	163	3,492
Machinery	"	1,863	86,644	77	8,395
Nuts	"	1,680	42,990	1,012	32,351
Oases	"	233	10,522	485	19,007
Olive oil	"	1,269	77,561	1,293	82,094
Tea	Lbs	184,626	47,644	27,099	4,805
Tomato	"	284,946	74,195	12,808	2,361
Wool, unskes	Tons	853	38,689	1,645	46,791
Other articles	"	—	91,577	—	16,382
Total			330,641		469,094

Annex C.—RETURN of all Shipping at the Port of Mariupol during the Year 1893.

ENTERED AND CLEARED.

Nationality.	Sailing.		Steam.		Total.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.
British	...	...	87	102,888	87	102,888
Greek	29	10,150	12	11,794	41	21,944
Norwegian	...	...	7	8,067	7	8,067
Italian	...	...	2	1,180	2	1,180
Other flags	...	...	11	11,232	11	11,232
Total	29	10,150	119	135,151	148	145,301
„ for the year preceding	12	3,812	67	65,680	79	69,492

RETURN of Principal Articles of Export from Mariupol during the Years 1893-92.

Articles.		1893.		1892.	
		Quantity.	Value.	Quantity.	Value.
			£		£
Wheat	Quarters	385,747	451,166	191,642	270,223
Rye	„	32,526	21,400	12,880	13,076
Barley	„	719,920	513,770	322,229	212,546
Oats	„	1,125	6,442	..	..
Linseed	„	1,806	3,125	2,805	4,690
Rapeseed	„	6,060	4,503	10,285	8,292
Staves	Tons ..	..	..	2,000	8,000
Coal	„ ..	3,175	2,064	1,375	875
Total	..	..	1,002,470	..	517,702

RETURN of Principal Articles of Import to Mariupol during the Years 1893-92.

Articles.	1893.		1892.	
	Quantity.	Value.	Quantity.	Value.
	Tons.	£	Tons.	£
Machinery, cement, firebricks, and fire-clay	13,200	264,000	1,335	26,700

**Annex D.—RETURN of all Shipping at the Port of Yeisk
during the Year 1893.**

ENTERED AND CLEARED.

Nationality.	Sailing.		Steam.		Total.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.
British	...	...	9	9,352	9	9,352
Greek	34	8,372	3	2,814	37	11,186
Other countries ...	1	64	1	924	2	988
Total	35	8,436	13	13,090	48	21,526
„ for the year preceding ...	28	6,230	17	17,998	45	24,228

**RETURN of Principal Articles of Export from Yeisk during the
Years 1893–92.**

Articles.		1893.		1892.	
		Quantity.	Value.	Quantity.	Value.
Wheat	Quarters	461,303	£ 431,052	391,913	£ 406,092
Rye	„	9,000	5,790	3,520	2,538
Barley	„	264,376	105,263	196,143	101,523
Linseed	„	120	178	1,350	1,523
Rapeseed	„	83,070	22,632	34,875	22,342
Oilcake	Tons	2,097	5,263	1,129	3,045
Wool	„	232	10,526	347	17,767
Total	..	..	570,704	..	555,830

**Annex E.—RETURN of all Shipping at the Port of Temriuk
during the Year 1893.**

ENTERED AND CLEARED.

Nationality.	Sailing.		Steam.		Total.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.
British	...	...	9	9,354	9	9,354
Greek	...	...	1	1,134	1	1,134
Other countries ...	1	80	2	1,392	3	1,672
Total	1	80	12	11,960	13	12,060
„ for the year preceding ...	6	1,386	3	3,040	9	4,426

RETURN of Principal Articles of Export from Temriuk during
the Years 1893-92.

Articles.		1893.		1892.	
		Quantity.	Value.	Quantity.	Value.
			£		£
Wheat	Quarters	37,875	41,954	9,828	12,934
Rye	"	14,072	12,040	26,420	23,147
Barley	"	50,555	29,300	2,832	1,787
Oilcake	Tons ..	..	..	825	2,640
Other articles	" ..	..	..	78	1,208
Total	..	..	83,294	..	41,716

KERTCH.

Mr. Vice-Consul Hunt reports as follows :—

In reporting on Kertch, I must again refer to the stagnant condition of this town and sea-port. With a railway to Theodosia it could be connected with the whole Empire, but it is not, although only 62 English miles from Theodosia. With a spacious and land-locked harbour, it has no harbour for commercial purposes, as the Kertch Bay, the same as the Taman Bay, is nothing but a great expanse of shallow water, having in the middle a natural and a dredged channel which is the great and undoubtedly important artery that connects the Azoff ports with the Black Sea and the rest of the world. Having an important export of fish and flour, it has this export checked at the most critical period when these bays freeze for about 3 months every winter.

In fact, the oft repeated complaint of the old inhabitants of Kertch, that their town was sacrificed to the interests of the Azoff ports, and left to vegetate the best it could, even if selfish, has no small force; for it must be admitted, that by the dredging of the Yenical channel, its former importance, as the centre where hundreds of ships had to undergo the long process of lightening before a 14 feet bar and reloading in the roads afterwards, is gone. In fact the small, but flourishing township of Yenical which existed and grew by lightening is fast disappearing; a house that was worth 1,500*l.* some 12 years ago could not find a buyer for 200*l.* now.

The above-mentioned complaint is not a vain sighing after old times, and it is based on pretty sound reasons; for recognising that Kertch interests had to be sacrificed to the more important one of direct export, still nothing has been done to keep Kertch going with the progress of time, whereas, millions on millions have been spent on nearly all the principal southern harbours.

(1762)

B 3

Some improvements being spoken of as imminent, I will briefly describe those urgently claimed by local public opinion.

Inner
harbour.

Kertch harbour, as before said, being a vast expanse of shallow water with a long frontage of quay on the town side, with a E.N.E. wind there is no shelter for lighters, coasters, and such craft which necessarily must load and unload at the quay and wharves. The E.N.E. wind being a frequent guest, not only work is paralysed, but even the safety of such craft, when suddenly caught at the quays, endangered, and when this wind rises to the force of a gale, everything is at a stop, the short waves it raises are so violent that the solid masonry quays give way, their present lamentable state, of half ruin, amply showing that either these quays must somehow be protected or absolutely abandoned.

For repairs, craft must be hauled on shore, as careening in an open bay is not always a safe operation, and even when being hauled on shore, such craft are in danger if suddenly caught half way by an E.N.E. squall.

From what I hear, either a breakwater is to be sunk at some distance and parallel to the quay frontage for the purpose of protecting them by an inner expanse of smooth water, or a couple of masonry moles are to be built forming a sheltered harbour.

The last or mole project finds strong opposition on the part of sea-faring men, on the plea that a perfectly enclosed basin would freeze much sooner, and of course break up much later; whereas, a straight line of breakwater giving all the necessary shelter, but having broad inlets at each end would not detain the ice so long, and even if frozen, would present far greater facility for cutting a channel in the ice when required. No doubt there is some sound reasoning in this.

Winter
harbour.

This has been a great desideratum of Kertch for years and years, for, comparing its undeniable and absolute necessity with the comparatively small outlay necessary to accomplish it, one wonders, why has it not been made at least 15 years ago?

In the ice season, which begins about half December and lasts until half March, the town of Kertch enters into what may be called a period of paralysis; a boat may, or may not touch behind the fortress, mails carried overland may bring a letter from England and the newspapers on the seventh or eighth day, or may bring a batch of letters and papers for 2 or more weeks at a time. This entirely depends on the state of the roads. The exporting merchant must cart his goods overland at great expense and loss. Import is, of course, out of the question. For a town of 41,000 inhabitants the grievance is, no doubt, an insupportable one.

Besides the general drawback, I will mention, for instance, the great loss that it causes to the very important local fish trade.

Herrings are caught by the millions near Kertch. The fishing begins with the first colds, and lasts as long as the ice permits it. It so happens that the fish is salted or pickled and ready for export after December, but after December ice is a sure guest, and this vast industry must bear the burden of a

heavy cartage expense, which, of course, falls on the industry and seriously maims the benefits. There are besides this six steam mills in Kertch, with a good export trade for the Caucasus coast. Now these mills cannot dream of it in the three frozen months. Still everybody knows that there is an easy remedy. More advanced people talk of a railway branch to Theodosia, but the general opinion would be satisfied with a much cheaper remedy in the so-called winter cove behind the fortress on the coast at the back of the town, where nature has already proved the possibility of winter communication. It appears that during the construction of Kertch fortress a Russian Government engineer, carrying on the works of the sunken barrier of Tuzla spit, commonly called breakwater, for convenience and dispatch hit on the idea of building a small mole with loose sunk stones, which formed a cove where, in comparative shelter, he could keep besides a couple of lighters a steam-tug. This he constructed at the spot near St. Paul's lighthouse where is a life-boat station now.

This accomplished, it became evident that the said small mole was an effectual barrier against the floating ice that the reigning current constantly carried from the Azoff in the winter months, and that even it helped to push and deviate the floating ice flakes, while the cove remained free. Now, it must be borne in mind that, whereas Kertch bay or harbour invariably locks up with ice, not so much by natural freezing as by being crammed with the floating ice carried by the Azoff current, which often gets compressed into a compact mass. The outer bay, formed by Cape Takly on one side and Cape Touzla on the other, an enormous sheet of water, rarely gets jammed up for more than a couple of days, the reigning strong Azoff current acting as a constant potent motor, for the stronger the E.N.E. wind gets the lower the temperature, but at the same time the stronger the current. In fact, this current being compressed, so to say, at the outlet between the fortress and the Touzla breakwater, rushes out with double force, carries the ice along the north and west shores, and leaves the Touzla shores and the wide mouth of the bay fully open and clear, except, as before said, for very short intervals. Once the fortress works finished, the cove became a welcome shelter to fishermen. At the same time an enterprising agent of the great Russian Steam Navigation Company soon saw the advantages that could be got out of it, and, being granted permission, used it for 3 years in succession as a winter station for mail boats during the ice season; he also erected a wooden wharf on the Touzla spit, and with a tug and barges sheltered in said cove, he opened during the same close season pretty regular communication with Taman overland carrying cattle and passengers. The fact appears to be certain that during three consecutive winters Kertch enjoyed the rights of an ice port, the only drawback being a couple of miles of road from the town to the landing place at the cove. This agent in course of time was superseded by another, who apparently had different ideas, the

mole not being kept in repair soon got washed off, the cove choked up, and the town for the last 15 or 16 years again returned to its pristine state of enforced ice quarantine. I am told that a good solid mole, which would make a well-sheltered cove, could be constructed in a year at an expense of about 15,000*l.* to 20,000*l.*

Exports. The exports of cereals from the port of Kertch for the year 1893 amounted to 213,732 qrs., valued at 214,530*l.* Showing a decrease of 27,849 qrs. compared to the year preceding. This decrease is due to the crop not being so abundant as in 1892, and also to there having been a smaller demand for wheat, the prices of which article were low abroad. Besides the above, about 895 tons of oilcake, valued at 2,162*l.*, were exported from Kertch to France.

Imports. During the year 1893, the same as the year preceding, no foreign goods whatever have been imported into Kertch direct.

Shipping. As can be seen from the annexed Table A, 111 vessels, of the aggregate tonnage of 109,609 tons, cleared from Kertch in 1893. Out of this number 79,699 tons represent British shipping.

Two British steamers, one German, and one Norwegian took 9,047 tons of salt from Arabat to Russian ports in the Baltic Sea.

Pilotage. Pilotage is still in the same condition as before, but I am given to understand that it is likely to be improved in the course of this year.

Fisheries. The herring fishing in 1893 was very abundant, and although prices were low still it paid very well those interested in it.

Annex A.—RETURN of all Shipping at the Port of Kertch during the Year 1893.

ENTERED

Nationality.	Sailing.		Steam.		Total.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.
Russian	11	110	37	79,699	37	79,699
British	1	292	1	6,206	11	7,100
Norwegian	1	1	3	4,226	6	6,206
French	1	1	1	1,206	3	4,226
German	1	1	1	1,206	1	1,206
Swedish	1	1	1	1,206	1	1,206
Dutch	1	1	1	1,206	1	1,206
Austrian	1	1	1	1,206	1	1,206
Portuguese	1	1	1	1,206	1	1,206
Spanish	1	1	1	1,206	1	1,206
Italian	1	1	1	1,206	1	1,206
Belgian	1	1	1	1,206	1	1,206
Swiss	1	1	1	1,206	1	1,206
Other	1	1	1	1,206	1	1,206
Total	38	1,086	59	98,723	97	99,809
for the year preceding	38	1,086	59	98,723	97	99,809

CLEARED.

Nationality.	Sailing.		Steam.		Total.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.
British	...	...	37	79,699	37	79,699
Russian	8	386	...	...	8	386
Italian	1	252	5	6,046	6	6,298
Norwegian	...	...	3	4,226	3	4,226
French	...	...	1	1,226	1	1,226
German	...	...	1	980	1	980
Greek	6	1,928	3	7,920	14	9,848
Danish	...	...	1	1,238	1	1,238
Austrian	...	...	4	3,712	4	3,712
Turkish	36	1,996	...	...	36	1,996
Total	51	4,562	60	105,047	111	109,609
„ for the year preceding	31	4,612	59	94,605	90	99,217

Annex B.—RETURN of Principal Articles of Export from Kertch during the Years 1893–92.

Articles.	1893.		1892.	
	Quantity.	Value.	Quantity.	Value.
	Quarters.	£	Quarters.	£
Wheat	90,434	105,770	180,142	239,244
Barley	77,491	50,981	44,779	36,781
Rye	9,288	6,790	7,953	7,458
Oats	9,339	8,875	...	...
Linseed	16,675	32,910	7,267	13,986
Rapeseed	10,505	9,214	1,440	1,400
Total	213,732	214,530	241,581	298,869

Annex C.—TABLE showing Total Value of all Articles Exported from and Imported to Kertch from and to Foreign Countries during the Years 1893–92.

Country.	Exports.		Imports.	
	1893.	1892.	1893.	1892.
	£	£	£	£
England	55,106	132,615	..	..
France	48,107	90,145	..	..
Italy	56,070	19,800	..	..
Holland	31,510	39,950	..	..
Belgium	10,046	1,926	..	..
Germany	6,642	10,500	..	..
Denmark	2,842	3,070	..	..
Turkey	4,207	863	..	..
Total	214,530	298,869	..	..

BERDIANSK.

Trade and
commerce.

Mr. Acting Vice-Consul Greene reports as follows :—

The staple trade of this consular district, the trade in cereals, has been for the last 12 months in a very unsatisfactory state, and large amounts of money have been lost both by local speculators in grain and by export houses. The price of wheat, which in January last ranged from $8\frac{1}{2}$ r. to 10 r. per chetwert, according to quality, was pretty steady until the month of May, in fact, it rather showed a tendency to rise. Up till then the prospects of a harvest were very indefinite, not only in the immediate neighbourhood, but in the whole of the grain-producing districts of Russia. The favourable weather during May advanced the growing crops rapidly, and glowing reports began to come in from all quarters setting forth the probability of extraordinarily heavy crops. As was to be expected, prices began to fall. The fall was gradual, but it was never interrupted for any length of time, and when the navigation was closed by the approaching winter in the beginning of December wheat was cheaper than it has been for many years, averaging from 6 r. to 7 r. per chetwert.

Agriculture.

The crops of grain of all kinds, although not coming up to the expectations of some of the enthusiastic prophets, turned out above the average, and no doubt this had much to do with the fall in prices. The yield per disiatine averaged as follows :—

Articles.	Quantity	
	From—	To—
	Chetverts.	Chetverts.
Ghirka	7	8
Winter wheat	$6\frac{1}{2}$	$7\frac{1}{2}$
Hard wheat	6	10
Rye	4	6
Barley	10	15
Oats	10	15

The quality of grain is much better than an average, with the exception of hard wheat, which in some parts suffered from the heat. Where this was not the case, however, the quality was excellent. The weather was, on the whole, much cooler than the average; a fair quantity of rain fell at the time when most needed, while the crops were in full growth. This made the harvest later than usual by 10 or 15 days. The price of labour was above the average, and this, combined with the heavy crops and the fact that grain of all kinds ripened almost simultaneously, made the harvesting of the grain very expensive to the farmers. Since the introduction in large quantities of reaping machines the farmers are not so dependent on labour as formerly, but, not-

withstanding this, agriculturists complain that this year the wheat costs them more to produce than they can get for it. In order to help our farmers to tide over the low prices, the local banks and rural authorities, with the help of the Imperial Bank, are making advances on grain. This, however, can only be done to a very limited extent, owing to the want of suitable warehouses where the grain can be stored under the control of the bank which advances money on it. In consequence of the desire of farmers to receive these advances on their grain, and thus tide over the hard times until prices advance, the demand for warehouses has increased to such an extent that prices for stores have nearly doubled. Thus, although the harvest has been abundant, the poor agriculturists have less benefit from it than they generally have from a moderate harvest. This, combined with the fact that they have been suffering from a series of poor harvests, makes their position one not to be envied. They are mostly heavily in debt and behindhand with their taxes. The prospect of a rise in prices, according to all accounts, is a remote one, and as long as they remain as at present there is no prospect of trade improving. One hears the same complaint from everyone, exporters, speculators, and merchants on all hands losing money; manufacturers and tradespeople with heavy outstanding accounts, the prospect of getting in which is remote.

Freights showed no great variation from the opening of the Freights. navigation in April, when they stood at 12*s.* until October, when they rose to about 17*s.*

Exchange varied between 9 r. 50 c. and 9 r. 60 c. per 1*l.* in Exchange. the earlier part of the year, to 9 r. 30 c. and 9 r. 40 c. at the close.

The few articles imported to this port will be found in Imports. Annex B, and are of small importance.

The export trade for 1893, as will be seen in Annex B, shows Exports. an increase of 333,759*l.* in value as compared with 1892. With the exception of a few cargoes of barley none of the grain shipped from this port was destined for the United Kingdom.

The amount of grain in stock with merchants and speculators at the close of the navigation amounted to about 200,000 qrs., principally wheat. This is exclusive of the grain held by the banks as security for advances to farmers.

With regard to industries every year sees a rapid advance. Industries. In Halbstadt, one of the largest of the numerous German colonies in this district, we find a starch factory of importance filled with the best of modern machinery and appliances. Although it is not possible to ascertain the output, it is said to be very considerable, and the quality of the product according to all accounts leaving nothing to be desired, it finds a ready market. In the same colony we find a rice mill, two foundries and engineering works, two breweries, a tannery, a brick and tile works, and a waggon works. Besides some 8 or 10 factories of importance, the whole of this district is now studded with small engineering works engaged chiefly in the manufacture of agricultural machines

and implements, most of them having their own foundries. These have all sprung up within the last 8 or 10 years, and this branch of industry is advancing with rapid strides. The town of Berdiansk can now boast of the largest reaper manufactory in Europe, capable of turning out 3,000 machines annually. The bulk of the pig-iron used is Russian, and the same may be said of a great part of the bar-iron. Much of the steel and other materials in a raw or half finished state is imported from England, America, and Germany. One well-known American house has taken up contracts to supply a considerable amount of knives and other parts of reapers for the 1894 season. The reapers manufactured here are of a type not found elsewhere, and specially adapted to the country. Their prices, 15*l.* to 17*l.*, bring them within the reach of the small agriculturist; the simplicity of their construction adapts them to the wants of farmers, whose mechanical knowledge is not of a high order, and at the same time brings them within the power of the light Russian horses. They are, moreover, durable and get through more work than the heavier and more complicated English and American machines. That they are better suited to the wants of the country is abundantly proved by the yearly output, which within a short time has increased from a few hundred to 20,000, while the import of American and English reapers decreases. The manufacturers are continually adding to their plant, but the best makers have never yet been able to meet the continually increasing demand. Originally they started to supply the wants of the local agriculturists, but as their machines become more known, orders flow in from all parts of Russia, both European and Asiatic. They are exported to Roumania and Bulgaria, and sent nearly all round the world to the Pacific coast of Siberia. Besides the factories and works here spoken of nearly every village in this district has its small makers of ploughs and farmers' waggons; although the work is turned out in a primitive fashion in small workshops, with the simplest of blacksmiths', joiners', and wheelwrights' tools, it is of very good quality.

Thrashing by machinery is almost unknown in the immediate neighbourhood of Berdiansk; there is not in the whole of the grain producing part of Russia another district where machines for this purpose are so conspicuous by their absence. The reason is not far to seek. The whole of the land is occupied by peasant proprietors and colonists and large farms are nearly unknown. Consequently steam thrashing machines are out of the question. Besides this, thrashing in the old fashioned way is found by the farmers to have its advantages over machine thrashing. They prepare a hard thrashing floor, lay down upon it the stuff to be thrashed and run fluted stone rollers over it until the whole of the grain is separated from the straw. They generally harness one horse to a roller and employ five or six at once on each floor. In this way they can thrash quite as much as by using the same number of horses in a machine, and they find the straw gets much better bruised and gives better food for cattle.

The weather during the thrashing season is very dry, and only once in the last 16 years has it interfered with this mode of thrashing. The thrashing floors cost nothing to make, and it is customary, even on small farms, to make several of them and thereby save cartage. No grain is stacked; generally cutting and thrashing go on simultaneously and grain has been known to be standing one day and offered for sale, ready thrashed and cleaned the next.

A circle of about 70 miles radius would enclose nearly all the machine factories in this consular district. The number of machines and implements manufactured and sold within the last 12 months is approximately as follows:—

Description.	Number.	Value.
		£
Reaping machines	20,000	330,000
Horse gears and thrashers ..	800	4,800
Chaff cutter	600	2,400
Ploughs	50,000	150,000
Sowing machines	500	5,000
Winnowers and grain-cleaning machines	3,000	300,000
Other implements	..	30,000
Total	..	822,200

The rinderpest has been very prevalent during a great part of the year in the Government of Ekaterinoslaff, and the rural authorities have been very strict. In several instances where cases have cropped up the peasants have had their cattle slaughtered by orders emanating from high quarters. This has been so thoroughly done that in many cases healthy oxen have been slaughtered along with those affected by the plague. Although all slaughtered cattle are paid for, yet the peasants being at once deprived of their cattle could not continue their field labour, and all traffic in cattle being forbidden, in some instances the peasants became desperate, and serious conflicts took place between them and the authorities. The strict measures have kept the Taurida government to all intents free from cattle plague during the last 12 months.

Annex A.—RETURN of all Shipping at the Port of Berdiansk
during the Year 1893.

ENTERED.

Nationality.	Sailing.		Steam.		Total.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.
British	...	...	23	25,496	23	25,496
Greek	41	14,042	15	11,559	56	25,601
Italian	21	8,331	26	17,715	47	26,046
Norwegian	...	...	19	17,031	19	17,031
Austrian	...	...	16	14,529	16	14,529
Turkish	17	1,392	2	2,432	19	3,824
French	...	...	1	1,292	1	1,292
Total	79	23,765	102	90,054	181	113,819
.. for the year preceding ...	55	16,083	60	49,836	115	67,969

CLEARED.

Nationality.	Sailing.		Steam.		Total.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.
British	...	...	23	25,496	23	25,496
Greek	41	14,042	15	11,559	56	25,601
Italian	21	8,331	26	17,715	47	26,046
Norwegian	...	...	19	17,031	19	17,031
Austrian	...	...	16	14,529	16	14,529
Turkish	17	1,392	2	2,432	19	3,824
French	...	...	1	1,292	1	1,292
Total	79	23,765	102	90,054	181	113,819
.. for the year preceding ...	46	15,622	60	49,836	106	65,458

Annex B.—RETURN of Principal Articles of Export from Berdiansk
during the Years 1893–92.

Articles.			1893.		1892.	
			Quantity.	Value.	Quantity.	Value.
Grain and seed ..	Quarters		940,115	£ 970,567	498,240	£ 638,414
Oilcake	Tons ..		1,664	3,310	847	1,694
Total	..	..	..	973,867	..	640,108

RETURN of Principal Articles of Import to Berdiansk during the Years 1893-92.

Articles.		1893.		1892.	
		Quantity.	Value.	Quantity.	Value.
Firewood	Tons ..	405	£ 270	1,000	£ 750
Hardwood boards ..	Pieces ..	14,500	3,000	8,748	1,312
Wooden grain shovels	" ..	"	"	7,000	140
Wine	Cwts. ..	"	"	70	250
Other articles ..	Lbs. ..	2,592	890	..	..
Total	..	..	4,160	..	2,452

NOTE.—Rate of exchange, 9 r. 50 c. = 1l.

ROSTOV-ON-DON.

Mr. Vice-Consul Martin reports as follows:—

Agriculture.

Both winter and spring sowings gave an abundant harvest, Agriculture. but in consequence of several periods of unfavourable weather experienced during the year, the quality of the crops was not uniformly good. Winter wheat was, as a rule, of an inferior quality, and rye barely came up to the average, other stuffs, however, were on the whole satisfactory, and in the case of barley unusually good. Linseed and rape-seed gave a satisfactory yield, although the area sown was rather restricted.

Hay gave a very good harvest both as regards quantity and Hay. quality.

Fruit gave very poor results generally, but vegetables turned Fruit and out satisfactorily. vegetables.

The supply was equal to the demand and wages normal. Labour.

Exports.

The business done in cereals during the past year was fairly Grain. up to the average in volume, the quantity exported amounting to 645,196 tons; the results, however, generally speaking, have been hardly satisfactory to either producers or merchants, in consequence of a gradual but almost uninterrupted decline in values throughout the year. A slight reaction, stimulated by rumours of drought and the damage likely to be suffered by the crops abroad, did actually take place at the beginning of April, but as

prospects improved after a beneficial rainfall in the month of May prices soon reached their former level, and the downward tendency again predominated.

Causes of fall
in prices.

The causes which influenced the fall in prices were: firstly, the unusually cautious and conservative movements of consumers on the foreign markets, aided by the absence of any considerable fluctuations in the exchange; secondly, the tariff war with Germany which seemed to foreshadow a largely restricted demand for that country of certain articles which it sorely needed, such as barley, the lower grades of winter wheat, &c., and lastly, the abundant harvests secured not only in this but also in the surrounding districts and notably in the Caucasus.

Government
grant
advances.

In view of the continued depression the Government decided to come to the assistance of the growers by granting advances on the security of their grain at greatly reduced rates of interest, and the consequence of this measure was that large quantities of grain were stored up in the interior and held in expectation of an improvement in prices. Unfortunately, notwithstanding that the German duties were in a fair way of being satisfactorily adjusted, no improvement had taken place towards the close of the year, and it is to be feared that the large quantity of grain now stored (calculated to be about two-thirds of the amount harvested) will cause a further relapse when thrown on the market next spring, especially if the crops give promise of a good harvest and the export demand is not unusually strong.

The proposals to increase the import duty on wheat set on foot in France and Italy towards the end of November, have likewise adversely influenced our market; as, in the event of their taking effect, a substantial falling off in the exportation of certain classes of wheat, but principally hard wheat, will undoubtedly be the result.

Comparison of
prices,
1892-93.

The great and almost unprecedented depreciation in values during the past year is made apparent by a comparison of the year's average prices for grain, with those of 1892, viz.:—

					Price per Quarter.					
					1892.			1893.		
					£	s.	d.	£	s.	d.
Wheat	..	..	..	..	1	9	3	1	2	10
Rye	..	..	..	..	1	4	4	0	15	3
Barley	..	..	..	..	0	14	6	0	10	5
Oats	..	..	..	..	0	13	7	0	11	0

Stocks of grain at Rostov on December 1/13, 1893, were calculated to be as follows:—

Articles.					Quantity.
					Quarters.
Wheat—					
Hard	..	..	..	..	136,800
Winter	..	..	..	..	255,600
Ghirca	..	..	..	..	9,160
Rye ..	..	..	..	..	71,200
Barley	..	..	..	..	339,398
Oats..	..	..	..	..	13,470

There were also about 20,000 sacks (about 180 lbs. each) of flour in stock.

Linseed and rapeseed, while enjoying a very fair demand, were not exempt from the general downward tendency, although in comparison with the depreciation of grain they may be said to have fully maintained their normal values, the prices quoted at the close of the year being linseed, 1*l.* 12*s.* 2*d.* per quarter, and rapeseed, 14*s.* 3*d.* per quarter. The quantity exported was 6,618 tons, and 7,000 tons respectively. Linseed and rapeseed.

There was a considerable increase in the export of this article, Oilcake. viz., 2,005 tons, as against 1,673 tons in the previous year. It may be observed that besides the products usually exported, hay and bran figure among the exports, the former to the extent of 886 tons, and the latter 1,447 tons, but it is more than doubtful whether a regular trade will be done in these articles, as the demand was due to exceptional circumstances and the results to shippers were not wholly satisfactory.

The quantity of merino wool brought to this market during the past season amounted to about 15,873 tons, as against 17,460 tons in 1892. Of this quantity, all was brought up by Russian and Polish manufacturers with the exception of about 2,381 tons which have remained here in store, in first hands about 1,587 tons, and about 794 tons held by speculators. The reason of this stock remaining has not been owing to any scarcity in the demand, it is due to the unwillingness of some of the owners to accept the current prices offered them, and paid to others 5½*d.* per lb. to 6¼*d.* per lb. These owners were in hopes of obtaining a better price later on, but have been severely disappointed as there are no buyers now but at a considerably lower figure, manufacturers having secured elsewhere the quantity required, and in many cases importing ready-washed wool from abroad. No wool was exported during the past year as foreign buyers were unable to compete with the rapidly increasing demand for home consumption, although it is only a few years back that they were almost the exclusive buyers. Wool—merino.

In view of the continued increase in the demand, and for fear that the import of wool from foreign countries will adversely affect the wool market here, a meeting of wool growers was held here a short while since at which it was decided to present a petition to the Ministry of Finance to impose a duty of 7 r. 20 c. Petition for import duty on wool.

gold per pound on imported wool. Another meeting was held in Moscow which voted that the Minister of Finance should be petitioned to fix the duty at 5 r. gold per pound. So far, it is unknown what result will accrue from these petitions.

Donakoi wool. The amount of Donskoi greasy wool brought to this market during the season of 1893 was as nearly as possible the same as in 1892, viz., about 3,651 tons. There was a fair demand at the beginning of the season for home consumption, about 317 tons being secured at prices averaging from 4*d.* per lb. to 4½*d.* per lb., after which only exporters continued buying, securing all the available quantity at 3½*d.* per lb. to 4*d.* per lb. Shipments in the grease owing to a scarcity of demand were a mere trifle as compared to former years, being in all 64 tons exclusively to America. The remainder of the wool was washed, yielding about 1,810 tons, all of which was shipped to America, excepting 159 tons shipped to Italy, Austria, and Germany, and about 270 tons still here in the hands of exporters. The quality of the wool was an average one, as compared with the last 3 years.

Brook-washed autumn wool. The quantity of brook-washed autumn wool brought during the past season was about half as compared to 1892, amounting in all to about 400 tons, of which 240 tons were secured for Germany at 6*d.* per lb. to 6½*d.* per lb.; the remainder is still unsold, lying in store, for which there are no buyers at present. There was a total absence of brook-washed lambs' wool, all being sent for sale to Moscow where there was a good demand. Shipments of autumn wools to the United States did not take place owing to the want of demand, although for many years past America has been the chief consumer.

Imports.

No official returns being obtainable, the only reliable information available from private sources is that concerning agricultural machinery.

Agricultural machinery. Notwithstanding the large trade done in machinery in 1891 and 1892 the operations during the past year again increased, the abundant harvest not only in the Caucasus but in the other provinces surrounding Rostov being the cause. The most appreciable increase in the sales of foreign machinery was in steam threshers and engines, about 300 being sold valued at 157,809*£.*, as against 180 in 1892, valued at 94,737*£.*, as usual all of English make; in American reapers, about 2,000, valued at 52,632*£.*, as against half that amount in 1892; and in hay rakes last year 1,700 having been sold, equal to 12,526*£.*, whereas in 1892 only about 500, valued at 4,474*£.*

Engines and steam threshers.

American reapers.

Hay rakes.

Horse-gear threshers. There was also an increase in the sales of horse-gear threshers, about 450, valued at 26,073*£.*, being disposed of; besides about 350 binders, valued at 16,578*£.*, of American make; and about 1,400 drills, equal to 17,684*£.*, half of which foreign and half Russian manufacture, were sold.

There was no special increase in the demand for Russian machinery, about 4,000 reapers being sold, equal to 63,158*l.*, as against 3,000, valued at 47,368*l.*, in 1892. Russian machinery, no special demand for.

The only noticeable decrease was in the sales of mowers, all of American manufacture, 120, valued at 2,274*l.*, as against 200, equal to 3,789*l.*, in 1892. This falling off was due to the abundance of hand labour during haymaking time, although the harvest was very plentiful; and also to the fact that a large number of Russian reapers was used for cutting hay, being well adapted for the purpose. American mowers, decrease in sale of.

The trade in ploughs was about the same as in 1892, about 2,000 foreign made ploughs being sold, and 7,500 of Russian manufacture, valued at 38,947*l.* The value of the sales of Russian ploughs has somewhat decreased, 27,368*l.* as against 31,579*l.* in 1892, although the quantity sold was about the same; this is owing to the decline in prices brought by increased competition. Ploughs. Decrease in value of Russian ploughs sold.

The local flour mills were kept busy throughout the year, as, besides a perceptible increase in the export trade, a good demand was experienced for the Caucasus and other parts, and grain prices having ruled low the results of the year's working are undoubtedly satisfactory. One of the mills was burnt down during the summer, but is about to be rebuilt, and besides this, two new mills are being fitted up. Industries—Flour mills.

Tobacco factories have again done very well, their output showing a further increase. A new factory has been built and is expected to begin operations early in the new year. Tobacco factories.

The construction of a quay along the left bank of the River Don, skirting the town, has been finally decided upon, and the plan fixed and adopted. No decision, however, has been arrived at as to whether the works are to be carried out by the municipality or given out on contract; and, besides this, there are financial difficulties to be overcome, the means available being very inadequate, so that it is rather difficult to foresee when work will actually be begun. Public works. Construction of quay, left bank, River Don.

Notwithstanding the apparent extinction of the cholera epidemic in September, 1892, and the measures taken to prevent its reappearance in the spring, besides the fact that so long a period had elapsed since its disappearance, it nevertheless broke out again in the middle of July of the past year. As in the preceding year, most of the cases occurred amongst the lower classes with but a very few exceptions; but the disease, however, while it lasted, although a much shorter time than in 1892, in all about 2 months, was of a more virulent nature, the death rate being 50 per cent. as against 43 per cent. of the previous year. As before, every effort was made, and no expense spared, by the authorities to prevent the spread of the epidemic, in which they succeeded. The number of cases and deaths registered were 780 and 388 respectively. Public health. Cholera epidemic. Number of deaths and cases.

Apart, the reappearance of the cholera epidemic, the health of the town of Rostov showed nothing unusual.

As was expected at the close of 1892, the disease began to Cattle plague.

diminish, and by the month of April of the past year had entirely disappeared from this district, during which period 1,426 cases occurred, 1,043 ending fatally. In the month of March killing the affected cattle was again resorted to, as was done at the outbreak of the disease in 1892 in order to prevent the spread of the infection, a further grant for the compensation of owners of killed cattle having been made; in this manner about 46 head of cattle were killed. In August, notwithstanding the existing quarantines, the disease again broke out in this district, but in a much milder form, lasting only about 3 months, during which 149 cases occurred, of which four proved fatal, the rest being killed. Since the beginning of November the disease has entirely disappeared, as also in many of the surrounding districts. The town of Rostov was not visited by the disease during the whole of the past year.

GHENICHESK.

Mr. Consular-Agent Costala reports as follows:—

General.	Ghenichesk is a small town on the west coast of the Sea of Azoff, with a population of about 7,000 inhabitants. It has no barbour but a safe roadstead, with an anchorage of from 16 feet to 21 feet of water about 3 miles from the shore. The only drawback is a bar, lying about half-way between the shore and the roads, about 3,150 feet in length, on which when the wind blows strong from the north there are only about 18 inches of water, which causes detention, demurrage, and expenses to the shipping.
Roadstead.	
Bar.	
Commission of Engineers survey of roadstead and bar.	Last year a Commission, consisting of Government engineers, surveyed the bar and roadstead, and I am informed that the Imperial Government intend this year to do the necessary dredging in order to remove this obstacle. It is also rumoured that Ghenichesk will be raised to the importance and privileges of a town or borough, as the export trade is progressing yearly, and promises to become important. This belief has already induced three large export firms to establish branch offices in addition to five offices which already exist.
Exports.	The exports of grain from Ghenichesk during the year 1893 amounted to 532,660 qrs., and valued at about 440,801 <i>l.</i> , besides which about 50 tons of oilcake were shipped, valued at about 60 <i>l.</i>
Imports.	No goods from abroad are imported direct to Ghenichesk.
Shipping.	During the year 1893, 4 sailing vessels and 57 steamers, of the aggregate tonnage of 70,976 tons, entered and cleared at the port of Ghenichesk, showing an increase of 19 vessels as compared with the year 1892, but of this number 44 steamers, measuring 57,783 tons, belonged to the British flag.
Stocks.	The stock of cereals at Ghenichesk is about 120,283 qrs. Of the different classes of wheat there are 52,567 qrs.; of barley, 43,416 qrs.; of rye, 23,606 qrs.; rapeseed, 684 qrs.; and about 800 tons of oilcake.

The harvest in the Ghenichesk district in 1893 was favourable, and, on the whole, above the average, and if the average quantity exported did not reach the usual amount, it was owing to prices for wheat being so low abroad.

Ghenichesk is connected by rail with the Sevastopol-Lozovai Railway line, the latter a large and important station on the Kursk-Kharkov-Azoff main line, and therefore it is in easy communication with the rest of Europe. No fresh plans for railways have been mooted in this district during the past year.

A great source of inconvenience at Ghenichesk is the want of banks. On account of this, merchants and masters of vessels loading at the port are at times at a serious disadvantage, but this defect will no doubt be remedied as soon as the place becomes more important and trade is carried on on a larger scale.

In 1893 navigation opened on April 4, and was closed on December 12.

Annex A.—RETURN of Principal Articles of Export from Ghenichesk during the Years 1893–92.

Articles.	1893.		1892.	
	Quantity.	Value.	Quantity.	Value.
	Quarters.	£	Quarters.	£
Barley	322,345	219,890	256,096	168,923
Wheat	146,190	165,470	62,435	88,037
Rye	62,085	53,500	29,040	29,482
Rapeseed	1,230	1,080	..	..
Oats	435	315	3,160	2,188
Linseed.. ..	375	551	..	..
Total	532,660	440,801	350,731	288,625

Annex B.—RETURN of all Shipping at the Port of Ghenichesk during the Year 1893.

ENTERED AND CLEARED.

Nationality.	Sailing.		Steam.		Total.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.
British	...	...	44	57,783	44	57,783
Greek	4	1,089	5	4,002	9	5,091
Italian	...	...	1	1,499	1	1,499
Turkish	...	...	2	2,090	2	2,090
Austrian	...	...	4	3,625	4	3,625
Swedish	...	...	1	888	1	888
Total	4	1,089	57	69,887	61	70,976
„ for the year preceding ...	1	550	41	44,844	42	45,394

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1365. Piræus	2d.	1423. Tunis	1½d.
1366. Stettin	2d.	1424. Baghdad and Busmorah ..	1d.
1367. New Orleans	2½d.	1425. Rio Grande do Sul ..	7½d.
1368. Angora	1d.	1426. Erzeroum	1d.
1369. Antwerp	2d.	1427. Christiania	5½d.
1370. Genoa	3½d.	1428. Charleston	5½d.
1371. Batoum	2d.	1429. Meshed	1d.
1372. Rouen	2½d.	1430. Copenhagen	½d.
1373. Santo Domingo	½d.	1431. Galveston	2½d.
1374. Nantes	1½d.	1432. Hamburg	2½d.
1375. Taganrog	2½d.	1433. Brindisi	2½d.
1376. Ispahan	4½d.	1434. Gothenburg	2d.
1377. Leghorn	3d.	1435. Kiungchow	1d.

No. 1436.

Reference to previous Report, Annual Series No. 447, p. 27.

RUSSIA.

ST. PETERSBURG.

Consul-General J. Michell to the Earl of Kimberley.

My Lord,

St. Petersburg, June 22, 1894.

I HAVE the honour to transmit herewith to your Lordship a Report drawn up by Mr. Vice-Consul Charles J. Cook, of Helsingfors, on the Finances of the Grand Duchy of Finland, which appear to be in a very sound condition, owing to the great skill and care with which they are administered, and contrasting favourably with those of many other countries possessing greater mineral wealth and advantages of soil and climate.

I have, &c.

(Signed) JOHN MICHELL.

Report on the Public Debt and Finances of the Grand Duchy of Finland.

ABSTRACT of Contents.

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When Finland, at the peace of Fredrikshamn in 1809, was Retropective. surrendered to Russia by Sweden, the Estates of the country (convened by the Emperor Alexander I to the Diet at Borga) had already at an earlier period of the year sworn allegiance to that monarch.

This took place after the Emperor Alexander had promised and confirmed the maintenance of the religion and laws of the Grand
(1816)

Duchy. These fundamental laws, consisting of the "Form of Government" of 1772, and the "Union and Safety Act" of 1789, formed the constitution of the country, and have been maintained hitherto and developed by the "Order of the Diet" of 1869.

Hence Finland has a political-constitutional entity of its own, separate from Russia, having its own administration; a representative assembly of its own, convened every third year; its own decimal coinage* (founded upon the Law of 1878, which established a metallic standard of gold in the Grand Duchy) as well as its own finances.

According to this constitution no new taxes can be imposed nor old ones abolished or altered without the consent of the Diet. On account of the taxes having been used exclusively for the benefit of the country, the finances of Finland prove to be in a very satisfactory condition, and every year has left a considerable surplus. These surpluses have been capitalised in order to form a reserve, and this capitalised reserve fund (the interest of which is used for State purposes) amounted in 1892, according to the report presented by the Treasury Department to the Diet for 1894, to about 40,000,000 Finnish marks, or 1,700,000*l*.

National
debt.

The administration of the National Debt, raised partly in Finland and partly abroad, is entrusted to the Treasury of Finland. All the public loans are amortised by drawings every half-year.

Loans.

The loans raised in the country were exclusively negotiated for redemption of the so-called "Donation-Estates," in the province of Viborg, an operation of great politico-economical importance, and one which has been attended with the most beneficial results to the peasantry of that province. Previous to 1811 (when this district was again incorporated with the rest of Finland) large properties had been given away to certain successful generals and other high-placed personages by the Emperors of Russia.

Many difficulties presented themselves when, after 1811, the question was raised of bringing the legal rights of the peasants, who lived on these properties, into harmony with those of the rest of the country. At last, with the consent of the Estates, the Emperor determined to depute the Senate for Finland to acquire all these lands for the State by purchase. During the course of the last 20 years this has been accomplished, and the peasants, by means of moderate annual payments, have obtained a reversion of the same from the State. The above-mentioned loans, which amount to about 8,000,000 Finnish marks (equal to 320,000*l*.), will be almost entirely repaid by the peasants.

The loans raised abroad have all been devoted to the development of the means of communication. On January 1, 1893, the loans in question amounted to 75,483,501 Finnish marks, or about 3,000,000*l*.

State of the
Debt.

According to the report of the Finnish Public Treasury for 1894, presented to the Estates of the Diet, the National Debt of Finland on January 1, 1893, compared with that of January 1, 1890, shows the following reductions:—

* The Finnish mark and penni = the French franc and centime.

Item.	Description.	Amount.	
		January 1, 1890.	January 1, 1893.
		Finnish marks.	Finnish marks.
U A	Loans raised in Finland, consisting of—		
	1. Public Treasury Bonds	6,867	6,867
	2. The bonds issued during 1872, 1873, 1875, and 1880, for the purchase of land, at $4\frac{1}{2}$ %, total 9,990,300 Finnish marks, of which remained un- redeemed	7,958,087	1,612,662
	3. Outstanding 3 % Public Treasury Bonds, of those emitted during 1888, so as to strengthen the Communication Fund ..	1,807,540	1,721
	4. The four series of 4 % Loan of 1890, issued for redemption of 1880 Loan ..	..	1,205,984
B	The loan raised in Russia in 1859, of which remained	4,278,760	3,661,520
C	The Premium - Loan, raised through the bankers, Erlanger and Sons, in 1863, whereof remained	4,445,807	3,833,156
D	Loan of 1882, at 4 %, concluded between the Bank of Finland and Messrs. M. A. Rothschild and Sons, for repaying subven- tion of 2,300,000 metallic roubles, which the Russian Imperial Treasury advanced to the St. Petersburg-Rühimäki Railway, of which there remained	9,253,500	8,864,000
E	Redemption Loan of 1886, at $4\frac{1}{2}$ %, and that at 4 %, also raised through Messrs. M. A. Rothschild and Sons, for railways	17,055,000	16,441,000
F	Loan at $3\frac{1}{2}$ %, negotiated by the Bank of Finland, through the bankers, S. Bleichröder, for redemption of remainder of loans at $4\frac{1}{2}$ %, negotiated during the years 1874 and 1881, also for strengthening the Communica- tion Fund	40,480,136	39,862,903
	Obligations and coupons to be redeemed abroad	14,426	23,688
	Total	85,300,124	75,483,501

On January 1, 1890, the Public Debt of Finland was consequently 85,300,124 Finnish marks—which sum it never exceeded—and on January 1, 1894, it had been reduced to 74,337,730 marks; during a period of 4 years it was, therefore, reduced by 9,816,623 Finnish marks.

State of
Public
Debt.

This satisfactory result is immediately attributable to the circumstance that the loans have been exclusively used for productive purposes, *i.e.*, for the development of the communications of the country, principally its railways. The value of these railways amounted already at the end of 1892 to nearly 153,000,000 marks, thus by 83,996,651 marks exceeding the loans negotiated for their building, which amounted in the aggregate to 68,996,467 Finnish marks.

Communi-
cation Fund.

To cover the interest of the National Debt, a certain portion of State revenues has been taken from the budget, and is annually paid over to the so-called Communication Fund. This fund is also sustained by the revenue derived from railways and other means of communication, as also by the excise duties. The surplus of the fund was estimated by the financial committee of 1894 at 2,500,000 Finnish marks, which amount is sufficient to pay interest and amortisation for another railway loan. The annual average yield of the revenues of the Grand Duchy in 1889-91, amounted to about 51,000,000 marks, and the expenditure to about 46,000,000 marks. Thus the receipts show a surplus of about 5,000,000 Finnish marks yearly.

Conclusion.

The above statement shows that the finances of Finland are generally in a flourishing condition; that the Public Debt of the country does not amount to half the value of the State railways alone,* and that the same, during the 4 years now terminating, has been amortised by about 10,000,000 Finnish marks, or to the extent of nearly 9 per cent., and, furthermore, that the condition of the Grand Duchy is consequently such as deservedly to merit the entire confidence of the financial markets of Western Europe.

* All the railways of Finland belong to the State, there being only about 20 miles of private lines.

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Nº. 1439.

DIPLOMATIC AND CONSULAR REPORTS ON TRADE
AND FINANCE.

R U S S I A.

REPORT FOR THE YEAR 1893

ON THE

TRADE OF THE DISTRICT OF THE CONSULATE-
GENERAL OF ODESSA.

REFERENCE TO PREVIOUS REPORT, Annual Series No. 1313.

*Presented to both Houses of Parliament by Command of Her Majesty,
JULY, 1894.*

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1350. Jerusalem	1d.	1410. Copenhagen	½d.
1351. Santiago	1d.	1411. Damascus	1d.
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1364. Callao	1d.	1424. Baghdad and Bussorah ..	1d.
1365. Pireus	2d.	1425. Rio Grande do Sul ..	7d.
1366. Stettin	2d.	1426. Erzeroum	1d.
1367. New Orleans	2½d.	1427. Christiania	5½d.
1368. Angora	1d.	1428. Charleston	5d.
1369. Antwerp	2d.	1429. Meshed	1d.
1370. Genoa	3½d.	1430. Copenhagen	½d.
1371. Batoum	2d.	1431. Galveston	2½d.
1372. Rouen	2½d.	1432. Hamburg	2½d.
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Reference to previous Report, Annual Series No. 1313.

R U S S I A .

ODESSA.

Consul-General Stewart to the Earl of Kimberley.

My Lord,

Odessa, June 20, 1894.

I HAVE the honour to forward my Report on the Trade and Commerce of Odessa for the year 1893.

I also forward Reports by the Vice-Consuls at Nicolaieff, Kieff, and Sebastopol on the Trade of those places, as also a Report on the Port of Theodosia now under construction, written by Mr. A. W. W. Woodhouse, Acting Vice-Consul at Sebastopol.

I have, &c.

(Signed) C. E. STEWART.

*Report on the Trade and Commerce of the Consular District of
Odessa for the Year 1893.*

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ODESSA.

The district of the Consulate-General of Odessa extends over Introduction. ten governments of Southern Russia, viz., Volhynia, Podolia, Bessarabia, Kherson, Taurida, Kharkov, Poltava, Kieff, Kursk, Chernigoff. The area in square miles is 211,496, and it has a population of 21,573,090 by the last census. The 3 largest towns in these governments being Odessa, Kieff, and Kharkov.

The year 1893 cannot be considered a successful year for trade Commerce. in Southern Russia if it be compared with some earlier years, but if the comparison be made with the two years immediately preceding it, 1893 must be considered a good year.

The volume of trade was fairly satisfactory, but great complaints are made that the margin of profit on the trade done has been small, prices having ruled very low indeed for almost all Russian export produce.

After two bad harvests, Southern Russia was blessed in 1893 Harvest. with a harvest very much above the average. In fact over a large part of the district of this Consulate-General the harvest may be considered to have been an abundant one, the places where the harvest was below an average being very few. In some places the wheat was somewhat discoloured by rain, the rainfall having come just before harvest, but this was not the case to any serious extent.

Though the granaries were full of grain that grain had been harvested at an unusually high rate. The price of labour during last harvest rose to an unprecedented figure, as described in my harvest report last autumn, while the price of all food grains fell so low in Western Europe that the producers in Russia were forced either not to sell at all or to accept an unremunerative price if they wished to dispose of their grain.

To add to the difficulties of the position, the tariff war with Germany deprived Russia of one of her chief markets for agricultural produce, especially for rye.

The Russian Government instituted a system of advances Government advances on grain. against grain, but the necessary preliminaries were rather complicated, and it was difficult for the peasants to avail themselves fully of the advantages which the Government were ready to afford them.

The class above the peasants did avail themselves largely of these advantages, and no doubt the stringency caused by the tariff war with Germany was somewhat relieved thereby.

The crop of 1894 promises so far to be a very good one. The Prospects of 1894. winter was in Southern Russia not a severe one, and too little snow fell in the south-western provinces to protect the winter-sown wheat from the frost. It suffered to a certain extent, but the heavy rain in the spring has to a great degree caused a recovery in the winter-sown wheat, and the spring-sown wheat promises an abundant harvest if the weather in June be favourable.

Agricultural depression.

The loss, or at all events the very small gain obtained by the proprietors from the abundant harvest of last year, has caused a feeling of depression amongst landed proprietors, and they declare that at the present high rate of wages for field labour it does not pay to grow ordinary grain crops. The consequence has been that a considerably less area was sown with grain last winter and this spring than in previous years, and this may in some small degree counteract the great fall in prices which will probably ensue after two good harvests in succession. However, prices in Russia must rule very low after the next harvest, unless a failure of crops in Western Europe or America should help the corn growers of this country.

Sunflower cultivation.

It is not English agriculturists alone that complain of agricultural depression, the cry is repeated in Russia that wheat, barley, and rye give no profit, and the large landed proprietors are trying to grow other crops where possible which pay somewhat better, like sunflower seed for oil, beet for sugar-making, linseed, &c.

The sunflower grown for oil-making is a slightly different variety from the garden variety, and I think would grow well in the southern counties of England. I have already been applied to and forwarded some of this seed to a grower in England. It would require to be planted rather early in England, I should think, to come to good maturity, but in a warm summer would almost certainly succeed.

It is declared that the only people who are doing fairly well by wheat growing are those peasants who can till their own or hired land, and reap their crops entirely by the labour of their own families. They, not having at harvest time to pay the high wages then demanded, are able to make a small profit.

Large demand for agricultural machines.

The scarcity of labour during last harvest caused a brisk demand for agricultural implements and machinery, especially steam and horse-thrashing machines. Every thrashing machine that could be purchased here was sold off last autumn and orders came in that could not be met. The demand this spring both for steam and horse-thrashers is very good indeed, and I am informed that all the orders received cannot be complied with. A very useful thrashing machine worked by from 8 to 12 horses is manufactured by an English firm at Elizabethgrad, in the province of Kherson, which seems to have met a want, and many of these are being sold in the Kherson Province. Similar thrashing machines are also manufactured in Odessa.

Coal.

The scarcity and high price of labour has adversely affected the supply of Russian coal from the coal mines, both in the Donetz and Don coal districts, and English coal, in spite of the heavy import duty imposed, is holding its own, 65,670 tons having been imported in 1893 into the port of Odessa, against 32,914 tons in the previous year.

Exchange.

The rouble has not varied very greatly in its exchange value during the year, the highest and lowest points touched in Odessa having varied from 9.86 r. to 9.35 r. per l.

Cholera.

Cholera was prevalent in many parts of Southern Russia during

the past year, but not nearly to so great an extent as during the previous year. The good sanitary condition of Odessa was again shown by there not having been any cases of cholera here until the month of December, and even then the number of cases was very few, the total number of deaths from cholera in Odessa having been only six. The disease is believed to have been imported from Constantinople into this port.

Cholera prevailed more or less in the province of Podolia throughout the past year.

It was disappointing to find that during the tariff war with Germany, English firms did not send out energetic young men to push British goods. Want of
English
commercial
travellers.

A great chance was lost, for so many of the articles used in Southern Russia are made in Germany, that the practical cessation of the importation of German goods seemed an opportunity for England. There is no difficulty in finding young Englishmen born in Russia, who can speak the language well and who are accustomed to business to travel for English firms in Russia, but except in the case of sheep dips I have never heard of English firms employing such agency. It is, of course, quite useless sending out travellers unacquainted with the Russian language and the ways of the country, and still more useless to send illustrated catalogues with no prices marked, as purchasers will not take the trouble to write for prices when they can see and obtain German goods only a little inferior to the British goods on the spot.

Several applications have been made to me by chemical manure Manure. manufacturers concerning an opening for their goods in this part of Russia, but I have been obliged to inform them that there is no demand whatsoever for manures here.

The people declare that in the hot, dry summers of Southern Russia, manure is of no value, and that on the contrary where two plots of land side by side have been sown, the one highly manured, the other unmanured, if the summer prove a hot and dry one as most of the summers are, the results on the manured plot will be decidedly inferior to those obtained on the unmanured plot, though in exceptional years when there is a heavy rainfall, no doubt, the advantage would be on the manured plot.

Odessa has in the last few years decidedly advanced as a manu- Factories. facturing town, and the number of factories has not only increased but the extent of the work done in them and the number of workmen employed has increased.

I send a list of the various factories now working in Odessa alone by which it will be seen that 9,464 workmen are employed in factories here, and produced goods to the value of 3,168,577*l*. Most of these goods would formerly have been imported from abroad.

Much of the capital for the different factories is supplied from abroad, and most of the managers and many of the foremen are foreigners, but the great mass of the work people are Russians, and the work turned out in these factories is only a little inferior to imported foreign goods except those of the highest class.

Such very high class goods cannot be manufactured here and will still continue to be imported.

Wages.

Russia is making great strides towards supplying her own wants for ordinary manufactured goods.

The wages paid to skilled workmen in these factories is also rising considerably, skilled artisans gaining as much as 6*s.* 6*d.* a day, while even skilled women earn as much as 3*s.* a day. Dock labourers also earn from 3*s.* 6*d.* up to 6*s.* 6*d.* a day.

Shipping.

The number of British ships which entered the port of Odessa in 1893 was 510, with an aggregate tonnage of 758,315, this is a considerable increase in the number of ships over last year when the numbers were 252 British vessels with a tonnage of 348,228 tons, but both years are below the average.

The highest number of British vessels to enter this port was 878 in 1888. There is every probability that in 1894 that number will at least be equalled.

Insufficient
berthing
accommoda-
tion.

Steamers suffer a good deal of delay at the port of Odessa whenever there are many vessels in port. As the lay days only begin to count from the time a vessel enters a loading berth, and as there are only some 17 loading berths ordinarily available for foreign seagoing vessels, while it is not uncommon for from 30 to 40 British steamers to be in port at once, it will be evident that with the best efforts of the authorities delays must occur.

In the month of January, 1894, vessels waiting to load grain under the shoots were delayed 8·3 days, and in February, 12·6 days before they obtained a berth, while vessels that accepted berths for loading by hand were kept waiting 6·3 days in January and 7·2 days in February.

By official returns of this port it appears that 130 steamers were, in the months of January and February alone, kept waiting an aggregate of 1,113 days. Calculating that each of these steamers lost 25*l.* a day by the detention, which is a low estimate, this would represent a loss of 27,825*l.* to shipowners for those 2 months alone, and January and February are not by any means the busy months of the year.

Representations have been made to the Russian authorities at St. Petersburg, pointing out the inadequacy of the harbour at Odessa and its loading facilities for its present trade, and it is hoped some extension of the loading berth accommodation and loading facilities generally may be obtained. The authorities in Odessa are most anxious for such additions to be made.

Freights.

Freights have ruled rather low during the year 1893, and I fear could not have proved very remunerative to shipowners.

The rates from Odessa to the United Kingdom averaged as follows :—

In—						Per Ton.
						<i>s. d.</i>
1893—						
January	..	..	..	..	..	7 0
February	..	..	..	..	..	7 4
March	..	..	..	..	..	8 2
April	..	..	..	..	..	7 10
May..	..	..	..	..	..	9 6
June	..	..	..	..	..	8 4
July..	..	..	..	..	..	9 3
August	..	..	..	..	..	9 11
September	..	..	..	..	..	11 3
October	..	..	..	..	..	11 11
November	..	..	..	..	..	12 1
December	..	..	..	..	..	11 3

The highest freight paid during the year having been 14*s.* a ton and the lowest 6*s.* 6*d.* per ton to the United Kingdom.

The port of Odessa was open throughout the winter of 1893-94, never having been closed by ice.

Annex A.—RETURN of Principal Articles of Import to Odessa during the Years 1893-92.

Articles.	1893.		1892.	
	Quantity.	Value.	Quantity.	Value.
	Tons.	£	Tons.	£
Agricultural imple- ments	1,532	45,564	969	29,713
Coal	65,670	40,715	32,914	29,435
Cotton, raw	37,551	1,591,794	47,496	2,216,082
Colonials	1,188	56,477	5,509	190,180
Dried fruits, nuts, &c.	4,725	102,302	4,109	30,970
Fresh fruit	13,974	99,300	11,737	86,317
Iron and steel	8,484	114,821	8,819	73,277
Manufactured iron goods.. ..	493	16,225	1,092	42,569
Machines	1,344	307,982	1,484	57,392
Olive and other veget- able oils	5,403	334,995	4,013	202,756
Tea	1,068	132,526	844	104,630
Tobacco and cigars ..	544	145,140	154	29,334
Jute	3,032	48,973	1,221	19,883
Wines and spirits ..	1,873	28,750	1,544	28,852
Mineral waters ..	6,999	13,019	6,076	9,449
Sundries	..	817,719	..	477,429
Total	..	3,896,307	..	3,628,268

RETURNS of Principal Articles of Export from Odessa during the
Years 1893-92.

Articles.	1893.		1892.	
	Quantity.	Value.	Quantity.	Value.
	Tons.	£	Tons.	£
Wheat	511,027	3,168,370	145,269	1,080,804
Barley	502,686	1,869,992	148,296	643,607
Rye	168,181	834,181	20,718	147,724
Maize	89,547	360,875	136,699	966,633
Oats	46,107	228,692	296	1,559
Sugar	7,435	217,089	22,110	529,254
Wool	909	52,591	1,944	118,252
Flour	17,255	212,231	11,281	162,579
Oil seeds	27,162	257,084	8,003	67,523
Timber and wood ..	81,870	131,316	20,794	89,035
Cattle, horses, poultry, &c.	644,970	150,633	..	261,319
Fish—dried, salted, and smoked	7,092	132,322	4,408	136,828
Butter and cheese ..	808	36,005	696	28,504
Caviare	1,055	53,072	730	36,650
Peas and beans	6,500	40,294	3,261	26,116
Oil-cake	8,528	39,007	11,847	58,044
Leather	1,045	48,841	1,335	58,000
Bone meal	1,473	7,402	3,573	26,584
Alcohol	..	71,377	..	66,147
Sundries	..	1,451,312	..	1,311,865
Total	..	9,372,376	..	5,816,323

Annex B.—RETURN of all Shipping at the Port of Odessa during the Year 1893.

ENTERED.

Nationality.	Sailing.		Steam.		Total.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.
British ...	...	...	510	758,315	510	758,315
Russian ...	2	357	213	231,149	215	231,506
Austrian ...	2	1,365	69	82,219	71	83,584
Italian ...	10	4,245	58	81,343	68	85,588
French ...	...	...	34	45,912	34	45,912
Norwegian ...	...	...	27	38,481	27	38,481
Danish ...	...	...	27	28,758	27	28,758
Greek ...	27	9,405	13	12,835	40	22,240
Turkish ...	10	2,465	...	...	10	2,465
Dutch ...	...	...	2	4,153	2	4,153
Roumanian ...	...	...	1	300	1	300
Total ...	51	17,837	954	1,283,465	1,005	1,301,302
„ for the year preceding , ...	79	20,663	684	783,063	713	803,726

CLEARED.

Nationality.	Sailing.		Steam.		Total.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.
British ...	...	...	506	753,576	506	753,576
Russian ...	2	357	209	225,075	211	225,432
Austrian ...	2	1,365	69	82,219	71	83,584
Italian ...	10	4,245	58	81,343	68	85,588
French ...	...	...	34	45,912	34	45,912
Norwegian ...	...	...	27	38,481	27	38,481
Danish ...	...	...	27	28,758	27	28,758
Greek ...	27	9,405	13	12,835	40	22,240
Turkish ...	10	2,465	...	...	10	2,465
Dutch ...	...	...	2	4,153	2	4,153
Roumanian ...	...	...	1	300	1	300
Total ...	51	17,837	946	1,272,652	997	1,290,489
„ for the year preceding ...	55	13,853	670	809,839	725	823,692

Annex C.—LIST of Factories in the District of Odessa.

Factories.	Number of Factories.	Number of Workmen.	Value of Production.
			£
Flour mills	13	347	339,058
Rice mills	2	82	39,400
Maccaroni factories	6	66	24,644
Steam bakeries	4	95	19,817
Sugar refinery	1	720	1,305,161
Distilleries	7	118	41,190
Champagne factory	1	40	85,000
Breweries	4	230	50,670
Mineral water factory	17	66	10,955
Vinegar works	1	6	5,700
Mustard factory	3	5	1,030
Steam salt mills	6	54	19,300
Sweetmeat factories	22	240	41,129
Margarine factory	1	30	10,022
Fish canneries	3	69	10,480
Sausage factories	4	37	8,297
Candle and soap works	7	186	95,771
Bone mills	3	59	5,915
Animal glue factory	1	..	400
Wax candle works	10	77	36,991
Tanneries	9	317	126,860
Hat factories	6	28	3,600
Wadded cotton works	6	11	1,411
Jute sack factory	1	675	90,000
Paper mills	1	60	7,500
Wall-paper mill	1	15	3,000
Tobacco factory	14	632	53,517
Cigarette-paper factories	4	100	4,900
Cork works	4	102	3,200
Steam laundries	2	91	4,827
Tarpaulin factory	1	8	690
Sail makers	1	4	457
Linen mills	2	18	1,525
Rope makers	1	135	34,500
String works	1	4	100
Iron foundries	29	1,614	155,621
Agricultural implements	3	220	34,500
Weight and sail works	3	68	5,440
Tin-plate works	5	158	27,200
Wire and nail works	2	92	18,550
Hook-and-eye factories	1	11	1,500
Small-shot factories	3	11	1,240
Electro-galvanic works	1	3	345
Insulator works	1	5	374
Optical instruments works	3	21	715
Zinc-covering works	1	10	475
Gold and silver works	3	45	4,821
Saw mills	4	55	9,716
Furniture works	8	151	11,794
Gilding works	1	30	3,150
Piano factories	2	35	4,100
Musical instrument factory	2	8	900
Carriage makers	4	66	4,238
Brick and earthenware works	16	293	12,200
Lime works	4	9	744
Alabaster works	2	6	1,300
Tinware factories	4	21	1,037
Asphalt works	2	27	6,120
Lucifer match factories	3	250	13,118

LIST of Factories in the District of Odessa—continued.

Factories.	Number of Factories.	Number of Workmen.	Value of Production.
			£
Blacking factories	3	206	21,676
Felt works	2	6	227
Button factory	1	72	7,500
Dyers	3	6	705
Ink and sealing wax factories ..	3	3	592
Chemical works	6	141	54,526
Fireworks factory	2	4	400
Gasworks	1	81	21,501
Oil, paint, and varnish works ..	9	208	154,945
Mineral oil works	3	40	7,160
Glassworks	1	10	2,520
Tile factory	2	34	2,600
Marble works	5	52	5,360
Portmanteau factories	1	8	644
Artificial flower works	4	19	510
Stays and corsets	1	7	1,100
Printing offices	31	647	23,996
Chromo-lithography	2	34	3,400
Total	..	9,464	3,168,577

NICOLAIEFF.

Mr. Vice-Consul Woodhouse reports as follows:—

The abundant harvest of 1893 had the effect of restoring to Nicolaieff the trade it had lost through the prohibition of exports. Every branch of business participated in the general revival, and, notwithstanding the low prices paid for grain, both proprietors and farmers were relieved from the serious financial embarrassments which menaced them.

If we turn to Annex A we shall see that the quantity of grain exported from Nicolaieff in 1893 reached the enormous figure of 791,534 tons. Never before had the shipments in a single season been so heavy, and if we take into consideration the fact that 80 per cent. of this grain was produced in 1893, and that the harvest was got in nearly a month later than in previous years, we may form some idea of the amount of business done during the autumn.

As shown in previous reports on trade and commerce, the revenues of this Empire are almost exclusively derived from the produce of its soil, and the experience of the last few years has proved to what extent the financial condition of the country is affected by the exports of grain. The blow sustained by the nation through the stoppage of those exports was such that grave doubts as to the future were felt by those who understood the gravity of the situation. Happily, however, those doubts have in a great measure been dispersed, and Russia is once more in a

Revival of
trade owing
to abundant
harvest.

Exports of
grain in 1893
unprece-
dented.

Russia again
in a position
to compete
with other
corn-growing
countries.

position to compete with the other corn-growing countries of the world.

Exports. The total value of the exports from Nicolaieff in 1893, as shown in Annex A, was 3,025,136*l.*, and the principal articles exported were wheat and barley.

Imports. The imports of 1893, with the exception of a quantity of machinery for the Imperial dockyard, consisted principally of coke, spiegeleisen, and firebricks, all of which were for the iron-works in the neighbourhood of Ekaterinoslav and at Krivoi-Rog.

Shipping trade. The shipping trade was quiet up to the middle of September, when the autumn season really began; and even then freights advanced but slightly, notwithstanding the demand, more than 16*s.* 6*d.* per ton to the United Kingdom or Continent at no time being paid.

Freights. Below are given the rates paid during the season:—

Month.	United Kingdom and Continent.				Mediterranean and Adriatic.	
	Per Ton.				Per Charge.	
	Orders.		Direct Ports and Berth.			
	From—	To—	From—	To—	From—	To—
	<i>s.</i> <i>d.</i>	<i>s.</i> <i>d.</i>	<i>s.</i> <i>d.</i>	<i>s.</i> <i>d.</i>	<i>Fr.</i> <i>c.</i>	<i>Fr.</i> <i>c.</i>
March and April ...	9 0	11 0	9 0	10 0	1 10	1 30
May and June ...	9 0	11 0	10 0	11 0	1 20	1 40
July and August ...	10 0	11 6	10 0	11 0	1 20	1 30
September and October ...	12 0	14 6	11 0	13 6	1 30	1 60
November ...	14 0	14 6	11 0	12 9	1 30	1 75
December ...	14 6	16 6	12 0	15 6	1 40	1 70

Shipping, British and foreign. Annex B gives the total number and tonnage of vessels of all nationalities entered and cleared at Nicolaieff in 1893, and it is very satisfactory to note that, of the 366 ships, registering 492,738 tons, 281 were British steamers of 384,688 tons, foreign shipping not exceeding 108,050 tons.

Lighterage. Lighterage during the season varied from 24 c. to 48 c. per tchetvert.

Public works. The commercial port may now be considered to be about completed. The whole of the new quay is reserved entirely for foreign shipping, there being sufficient accommodation for coasting vessels in the new harbour.

Grain elevator. The grain elevator is finished and in full operation, but the manipulation of grain and loading of ships are at present performed rather slowly. Doubtless, however, in the course of time more expeditious methods of working will be adopted.

New elevator. It is reported that it is intended to erect another elevator at Nicolaieff.

Ochakoff bar. The further deepening of the Ochakoff Channel has been deferred, but the mouth of the Dnieper is to be dredged to 17½ feet.

The ice-breaker experienced much difficulty in keeping the river open during the winter. In fact, when the severe frosts set in, it was practically useless. It must, however, be said that it opened the navigation of the Boug much earlier than usual.

The municipality has at length decided to accept a proposal to lay down tramways in the town, and very possibly the work will be started upon before the end of the present year.

Telephonic communication has been established between Nicolaieff and Odessa.

The silk-growing industry is developing most satisfactorily, and the promoters are very sanguine as to the ultimate results.

The health of the town and neighbourhood was very good during the whole of the year. A few isolated cases of cholera occurred in the month of August, but the epidemic was speedily stamped out.

The mineral district of Krivoi Rog has received further attention from the Imperial Government, and a branch line of railway, running close alongside the quarries and mines, has recently been opened for traffic, thus greatly facilitating the transport of the various minerals raised from the workings, some idea of the extent and value of which may be gathered from the official statistics, which give the annual output of iron ore alone at something like 800,000 tons.

A company has been formed for the purpose of developing further the resources of Krivoi Rog, and new iron-works and blast-furnaces will shortly be established at Kremenchug.

Annex A.—RETURN of Principal Articles of Export from the Port of Nicolaieff during the Years 1893–92.

Articles.	1893.		1892.	
	Quantity.	Value.	Quantity.	Value.
	Tons.	£	Tons.	£
Wheat	387,388	1,511,840	144,515	800,153
Barley	278,018	903,589	111,714	380,945
Rye	82,532	334,783	9,181	43,258
Oats	32,954	139,796	1,550	6,720
Linseed	6,240	59,052	2,724	23,640
Other seeds	4,402	22,102	1,000	4,200
Sugar	1,783	38,780	1,260	27,340
Flour	353	5,470	181	2,810
Other articles (including sheep)	..	10,224	..	20,029
Total	..	3,025,136	..	1,369,095

RETURN of Principal Articles of Import to Nicolaieff during
the Years 1893-92.

Articles.	1893.		1892.	
	Quantity.	Value.	Quantity.	Value.
	Tons.	£	Tons.	£
Cement	560	1,690	..	..
Coke	12,471	12,316	..	..
Firebricks	3,653	5,920	2,095	4,083
Iron and steel	67	970	17	205
Iron and steel goods and machinery	2,086	128,944	380	12,290
Pig-iron (Spiegeleisen)	3,334	17,421	3,772	12,897
Sundries	752	6,436	..	22,697
Total	22,923	173,697	..	52,172

Annex B.—RETURN of all Shipping at the Port of Nicolaieff
during the Year 1893.

ENTERED.

Nationality.	Sailing.		Steam.		Total.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.
British	..	..	281	384,688	281	384,688
Norwegian	..	..	23	36,278	23	36,278
Austrian	..	..	21	23,964	21	23,964
Italian	..	..	18	24,628	18	24,628
Greek	1	626	8	6,944	9	7,570
Danish	..	..	4	4,192	4	4,192
French	..	..	3	3,288	3	3,288
Dutch	..	..	1	2,116	1	2,116
German	..	..	1	1,228	1	1,228
Russian	..	..	1	1,206	1	1,206
Turkish	4	1,313	..	..	4	1,313
Total	5	1,936	361	436,892	366	438,828
.. for the year preceding	5	1,584	149	195,438	154	196,972

CLEARED.

Nationality.	Sailing.		Steam.		Total.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.
British	..	..	281	384,688	281	384,688
Norwegian	..	..	23	36,278	23	36,278
Austrian	..	..	21	23,964	21	23,964
Italian	..	..	18	24,628	18	24,628
Greek	1	626	8	6,944	9	7,570
Danish	..	..	4	4,192	4	4,192
French	..	..	3	3,288	3	3,288
Dutch	..	..	1	2,116	1	2,116
German	..	..	1	1,228	1	1,228
Russian	..	..	1	1,206	1	1,206
Turkish	4	1,313	..	..	4	1,313
Total	5	1,936	361	436,892	366	438,828
.. for the year preceding	5	1,584	149	195,438	154	196,972

KIEFF.

Mr. Vice-Consul Smith reports as follows:—

The year 1893 must be looked upon as another poor year in the history of South Russia. The harsh winter of 1892-93 played serious havoc with the winter-sown grain, so that a large acreage had to be re-ploughed. The backward spring was succeeded by a cold, wet summer and autumn, so that the harvesting of grain and beetroot was carried through under great difficulties. The scarcity of labour added considerably to the cost of production, and this, taken in conjunction with the low prices for grain ruling on the foreign markets, left little hope of growers covering expenses. The tariff war with Germany debarred export to that country, so that not only was it impossible to sell grain at anything like remunerative prices, but there was a total absence of buyers. It is, therefore, plain that there is an immense quantity of unsold grain in the country at the present time. During the last 4 months of the year there was a remarkable scarcity of ready money in this district, and many first-class firms had to resort to unusual measures to tide over the season. The sugar trade cannot complain as to result of 1893. Thanks to the action of the "ring" or syndicate in exporting the surplus production of 1892-93, the demand greatly exceeded the supply, prices ruled high, and the fact of foreign-made sugar having been imported by Government, as stated further on, clearly shows the futility of allowing such rings to exist. General remarks.

Kieff was again visited by this dreadful scourge in 1893, and although the epidemic was much less severe than in 1892, when there were 1,940 cases with 663 deaths, the fact remains that from July 23 until November 24 there were 1,199 cases, of which 466 proved fatal. There is certainly good reason to suspect that the water supply of Kieff, taken as it is from the Dnieper, stands in need of better purification than at present before being supplied to inhabitants, otherwise it is difficult to imagine a city so bountifully gifted by nature as Kieff being subject to such visitations of cholera. Cholera.

The rate of exchange was remarkably steady during the year, there being an entire absence of those fluctuations observable during the last 10 years. The year 1893 opened with a rate of 9 r. 81 c. to the 1*l*., and daily improved until 9 r. 40 c. was quoted on February 21. A slight reaction set in, and 9 r. 70 c. was quoted on April 5. This rate steadily improved until 9 r. 36 c. was quoted on June 6. During July a drop was noticeable, which culminated in a rate of 9 r. 79 c. being reached on August 5. From that date a steady improvement set in, and by December 22 the rate of 9 r. 30 c. was quoted, and the year closed with 9 r. 32 c. to the 1*l*.. With such slight variations as given, the speculative element in business is entirely eliminated, and an average of 9 r. 53 c. to the 1*l*. cannot be considered as unfavourable to importation of foreign goods. Exchange.

(1814)

B

Operations on
Kieff
exchange.

According to the committee's report, the following business was transacted on 'change during the year:—

Articles.		1892.		1893.	
		Quantity.	Value. £	Quantity.	Value. £
Sugar—					
Raw	Tons ...	222,521	5,472,259	186,766	3,759,331
Refined ... ..	... ..	143	4,800	326	10,827
Starch ... ..	... ..	10,342	56,785	4,933	24,400
Wheat ... ..	... ..	210,800	148,797	25,449	117,125
Rye ... ..	... ..	15,338	168,761	15,100	67,117
Oats ... ..	... ..	1,430	6,000	12,202	40,294
Maize, millet, &c. ... ..	... ..	1,200	6,458	1,400	6,225
Barley ... ..	... ..	...	...	1,670	1,034
Flax, rape, &c. ... ..	... ..	...	...	5,006	37,921
Corn ... ..	... ..	...	...	6,000	3,940
Spirits	Degrees ...	11,600,000	23,715	5,200,000	7,274
Shares, &c. ... ..	... ..	...	110,679	...	543,000
Total	...	...	5,928,024	...	4,544,507

Mortgaged
land in Little
Russia.

According to latest report of Kieff Agricultural Bank the extent of land mortgaged and amount advanced in Little Russia is as follows:—

	Number of Estates Mortgaged.	Acreage of Estates Mortgaged.	Estimated Value of Estates Mortgaged.	Amount of Mortgages.
			£	£
Kieff	986	1,222,317	3,382,956	1,947,060
Podolia	707	904,530	9,941,732	1,705,030
Wolhynia	738	1,350,266	1,878,393	1,092,100

It is interesting to note that at December 31, 1893, the Imperial Nobles' Land Bank had to receive interest, &c., on mortgaged land in Russia to the amount of 4,006,850 r. (400,685*l.*), and of that amount only 1,002,484 r. (100,248*l.*) was paid, a fitting testimony to the present condition of agriculture.

Distillation.

The quantity of grain-spirit produced in 1893 by the 215 distilleries of this district was 959,939 vedros (2,879,817 gallons), the quantity on stock on December 31 being given as 456,413 vedros (1,369,239 gallons).

Acreage of
potatoes for
distillation of
spirit.

The area sown in Little Russia in 1893 was 12,220 dessiatins (33,605 acres), the yield from which was 6,121,345 poods, or 98,732 tons, giving an average of 59 owts. to the acre. When compared with 1892 the result shows 215,812 poods, or 3,481 tons less, the result of bad harvests in Wolhynia. The percentage of starch ranged from 13 per cent. to 21 per cent.

Navigation on
River
Dniaper.

During the navigable period, from April till November, 10,797,491 poods, or 174,154 tons of goods, valued at 4,542,600 r. (454,260*l.*), were loaded in steamers, barges, and rafts, while 21,190,124 poods, or 341,776 tons, valued at 6,464,720 r. (646,472*l.*), were discharged.

Towards the end of 1893 the South-Western Railway, whose general offices are in Kieff, placed in order with the South Russian Dnieper Works for 500,000 poods, or 80,646 tons of steel rails, at the price of 1 r. 67 c. per pood, or 11½ per ton.

From subjoined table of prices it will be seen that there was an immense drop in prices, from 30 per cent. to 40 per cent., between prices ruling during first 7 months of the year for cereals of 1892 harvest, and latter 5 months for cereals of 1893 harvest:—

Month.	Price Per Pood.							
	Wheat.		Rye.		Barley.		Oats.	
	From—	To—	From—	To—	From—	To—	From—	To—
	Copecks.	Copecks.	Copecks.	Copecks.	Copecks.	Copecks.	Copecks.	Copecks.
Harvest, 1892—								
January ...	84	88	60	73	55	67	67	...
February ...	72	87	58	72	47	52	62	66
March ...	80	90	60	68	42	50	53	67
April ...	73	86	62	70	45	52	55	68
May ...	75	88	68	78	47	55	60	72
June ...	80	92	60	73	50	56	65	70
July ...	70	88	45	70	40	46	67	69
Harvest, 1893—								
August ...	62	75	40	58	35	40	46	58
September ...	57	72	48	60	30	42	45	53
October ...	55	76	44	56	28	38	42	52
November ...	52	65	40	58	28	37	40	48
December ...	50	60	35	50	27	35	35	40

NOTE.—100 copecks = 1 r.; 9·50 r. = 1½; 1 pood = 36½ lbs.

The markets of Europe being stocked with grain left little chance of any demand for export during the early part of the year, and, consequently, prices receded more or less until the middle of May. A spell of cold weather then setting in caused prices to rise, but a warm June with seasonable rains had a lowering tendency upon the foreign markets, and prices fell considerably; in fact, there was little or no demand, and when Germany raised the duty upon grain imported from Russia the closing of her markets practically stopped all exportation from this district, Germany having hitherto been the largest buyer of grain grown in Little Russia.

The Government, in order to lessen the effects of the tariff war with Germany, decided to make advances on grain in the hands of producers, and according to last return of Imperial Bank 23,176,000 r. (2,317,600*l.*) has been advanced by its branches and other banks. This scheme was not favourably received at first, farmers and others considering the formalities too troublesome, but above figures would prove that there was absolute need of such a scheme.

The South-Western Railway Company was authorised by the Government to purchase grain, mostly rye, to fill the military magazines. This is a new departure, and is no doubt due to the desire of Government to compensate farmers for the loss of (1814)

markets caused by the tariff war with Germany, dispensing altogether with the "middlemen," generally Jews, and ensures a better price to farmers on the one hand, and greatly reducing the work of the Commissariat Department in providing grain required by the army. The railway company is not likely to reap much benefit from the transaction, owing to having to store grain until the Commissariat Department take delivery, and the want of proper warehouse accommodation entails a lot of attention in keeping grain from heating, while the ravages of mice cause a considerable loss. The Odessa district has ordered 639,000 poods, or 10,307 tons, for the magazines of Odessa, Bender, and Kremenschug. The Kieff district has ordered 839,700 poods, or 13,545 tons, for the magazines of Kieff, Berditscheff, Rovno, and Winnitza. The Wilna district first of all ordered 178,000 poods, or 2,880 tons, but have increased same by 500,000 poods, or 8,065 tons, for the magazines of Kovno and Wilna.

Factories, &c.,
in govern-
ment of
Kieff.

There are 638 factories in Kieff government, and of this number 137 are in the city of Kieff:—

Description.	Number.
Flour mills, steam and water driven ..	135
Sugar factories (from beetroot) ..	61
Distilleries	72
Saw mills	29
Breweries	27
Iron foundries, &c.	27
Tobacco factories	20
Brickmakers	61
Tanneries	33
Railway workshops	7
Glass-works	5
Refineries	4
Yeast-works	4
Paper-works	3
Wire-works	2
Sundries	148
Total	638

Tariff war
with
Germany.

There can be no doubt that the unfortunate raising of duties by Germany and Russia is responsible for the low prices ruling for grain during latter half of year, as well as entire absence of buyers, and everyone conversant with Russia knows that when agricultural produce is unremunerative, the trade of Russia is scarcely worth consideration. That the tariff war with Germany was an opportunity for British manufacturers to step in and bid for the immense trade held by Germany formerly is patent to everyone acquainted with this country, and that the British manufacturers utterly failed to reap any permanent benefit is also well known to everyone acquainted with Russia. I can personally testify to cases where British manufacturers were asked to quote for implements and machinery similar to those made by German manufacturers, and known to be suitable for Russian market, with

the result that British manufacturers regretted very much not being in a position to quote, owing to their patterns being different and so much superior, failing altogether to see that however much their goods may be suitable for the British market, there is a wider field open for those prepared to supply goods suitable for, and made in accordance with the requirements of other countries. Now that the tariff war with Germany is over, it is safe to say that Russia is inundated with travellers and offers from Germany, and the spirit of enterprise shown by Germany in being willing to adapt her manufactures to the requirements of Russia, bids fair to ensure the largest proportion of Russia's requirements for the next 10 years being supplied by Germany.

The accompanying Annexes A and B give particulars of the ^{Sugar.} sugar industry. The average price upon the Kieff market during 1893, for prompt delivery, was 5 r. 8 c. per pood, or 33l. 10s. per ton, while future delivery was 4 r. 10 c. per pood, or 27l. per ton, with delivery at nearest station, while the average price for the same sugar upon the London market was 14l. 15s. per ton. The 226 factories in Russia expect a yield of 34,863,787 poods, or 562,324 tons of sugar from the "campaign" of 1893-94, and of this quantity 206 factories, producing 32,946,107 poods, or 531,392 tons, are parties to the "ring" or "syndicate" referred to in previous reports, while 20 factories, producing 1,917,680 poods, or 30,932 tons, do not participate in it. The above yield is far in excess of that of any previous year, and is due to the good quality and abundant crop of beetroot of last year. Of the above quantity it is estimated that for home consumption 400,000 tons will be required; for the markets of Asia, 21,000 tons; and to complete stocks in stores and factories, 40,000 tons; thus leaving about 101,324 tons to be exported to Europe.

It is reported that several of the sugar factories intend increasing ^{Increase of} area of beet sown hitherto, the increase being due to expected ^{area of beet} collapse of ring or syndicate. The conditions attaching to participation in ring stipulated that each factory was to produce a fixed quantity, and all produced above that quantity had to be exported at whatever loss. The quantity allotted rarely allowed the factory to work full time, the consequence being that the cost of production came out too high, and in those cases where production exceeded allotted quantity, there was a double loss in having to export same. On the other hand, had these factories the right to work to their full capacity, the cost of production would be greatly reduced, and loss upon quantity exported would consequently be much less.

The annual consumption of fuel is 181,800 cubic saschins, equal ^{Fuel} to 62,357,400 cubic feet, of wood, and about 8,000,000 poods, equal to ^{consumed by} 130,000 tons, of coal supplied by Dombrowa (Poland) and Don ^{sugar} Basin pits. 1 cubic saschin, equal to 343 cubic feet, of wood has ^{factories.} the same heating effect as 39 cwts. of Don Basin coal, as against 45 cwts. of Dombrowa coal.

The original term of this ring or syndicate expires in 1894, and ^{Sugar ring} great efforts are being made to have a new term arranged. I have ^{the cause of} ^{foreign-made}

sugar being
imported.

so often given particulars of the baneful influence of this combination of manufacturers, that it would be superfluous to again go into its conception and history. The year 1893 witnessed the remarkable fact of Russian Government importing 1,714,018 poods, or 27,646 tons, of foreign-made sugar, consequent upon the action of the ring having exported the surplus production of 1892-93 campaign. This action was forced upon the Government in order to keep the price upon Kieff market from rising above 5 r. 20 c. per pood, or 32*l.* 5*s.* per ton, in accordance with ukase mentioned in my report of 1892. Of course as long as the "ring" is allowed to export the surplus production, there is the prospect of price being kept high enough to call for Government intervention often enough in the future. The foregoing quantity imported cost the Government 6,225,068 r., or 622,506*l.*, and was sold by Kieff branch of St. Petersburg International Bank on their behalf for 9,436,561 r., or 943,656*l.*, leaving a clear profit of 321,150*l.* upon the transaction. It certainly seems curious to those unacquainted with the wonderful working of "rings" or "syndicates" to see the ring, in order to maintain the price upon home market, exporting surplus production, and securing the excise duty on same as a drawback, and Government having to step in and import sugar to meet the demand of Russian consumers, who, unfortunately, have to pay dearer for sugar on account of such actions.

Shares in
sugar factories
as an
investment
for capital.

The sugar factories of this district, as an investment for capital, may be considered as equalling a Californian gold mine by those fortunate enough to possess shares. With factories paying dividends of 23, 30, 33, 38, 53, 55, 62, and 80 per cent. upon invested capital, it is no wonder that new factories are projected, and others, long standing idle, are to be remodelled and started. It is difficult to imagine legitimate trading giving such returns upon capital, but as long as rings or syndicates are allowed to exist, there is every prospect of such dividends being paid out annually. By law neither foreigners nor Jews are allowed to purchase shares in sugar factories. Keeping such facts in view, it is clear that the existence of rings or syndicates is a question of vital importance to those who own factories or shares in same, and when promoters of rings state that sugar is a luxury for the well-to-do portion of the community, there can be no doubt of every endeavour being made to prolong existence of rings.

Public works.

The drainage of Kieff is rapidly approaching completion, and it is expected that part of scheme will be in operation by summer of 1894. The tramway company has found that after dispensing with horse haulage for steam-power, the engines, taken over by them from original contractor, and built at his company's works at Colonna, are far too weak for the traffic, besides being constantly under repair, and consequently the whole tramway system is being converted for working by electricity. The work is being carried out by the General Electric Company of Berlin and much progress has already been made, and it is expected that most of the principal lines will be open for traffic in course of a few months.

Annex A.—TABLE showing Quantity of Sugar Manufactured by the 226 Factories having their Headquarters in Kieff, or belonging to the Kieff Association of Sugar Manufacturers, and disposition of same, for the Seasons 1892-93 and 1893-94.

	Quantity.			
	1892-93 (actual).		1893-94 (estimated).	
	Tons.	Tons.	Tons.	Tons.
Stock on hand	24,553		29,770	
Imported during year..	27,645		..	
Manufactured	397,559		562,324	
		449,757		592,094
Home consumption ..	401,184		400,000	
Exported to Europe ..	..		101,324	
" Asia	18,803		21,000	
To complete stock in stores, factories, &c..	..	419,987	40,000	562,324
Stock on hand, December	..	29,770	..	29,770

	1892-93 (actual).		1893-94 (estimated).	
	Quantity.	Area.	Quantity.	Area.
	Tons.	Acres.	Tons.	Acres.
Quantity and area of beetroot used in manufacture.. ..	3,603,090	702,377	5,577,461	859,829

Annex B.—TABLE showing quantity of Sugar Exported by the 226 Factories having their Headquarters in Kieff, or belonging to the Kieff Association of Sugar Manufacturers.

	Quantity Exported.	Value.	Price per Ton on Kieff Market.
	Tons.	£	£ s. d.
1891, from campaign 1890-91..	70,725	2,222,534	31 8 6
1892, " 1891-92..	109,957	3,271,221	29 15 0
1893, " 1892-93..	18,803	619,900	33 10 0

SEVASTOPOL.

Mr. Acting Vice-Consul A. W. W. Woodhouse reports as follows :—

Commerce.

Trade and commerce at Sevastopol during the year 1893, judging by the quantity of grain exported, had greatly improved since the preceding year.

It being absolutely impossible to get any official statistics as to the actual amount of trade done, the figures given cannot be implicitly relied upon as correct, and therefore only an estimate of the actual state of affairs during the year under consideration can be arrived at. I use the word "estimate" advisedly, being almost a total stranger to Sevastopol.

Shipping.

Annex A shows an increase of 100 in the number of ships that visited Sevastopol in 1893 as compared with that of the previous year.

Exports.

The export of cereals (shown in Annex B) was considerably increased by the abundant harvest of last year.

Prices.

The price of grain reached a very low figure, and had the producer been obliged to sell his crops for anything he could get, there is no doubt that the quantity exported would have reached a far greater figure.

Low prices
due to
abundant
harvest.
Measures
taken by
Government
to prevent
distress.

When the harvest had been gathered in it became evident that the enormous yield would lead to a great fall in prices.

To prevent distress through having to sell at any price, the Government came to the aid of the producer and offered to mortgage his grain at a certain rate. This measure, owing to the many irksome formalities which had to be observed before the money was advanced, proved of very little good. To facilitate matters an able official, at the head of the Crown banks in the province of Taurida, procured a modification of the said formalities, which especially benefited the peasantry, and the result exceeded the most sanguine expectations.

The manner in which this was accomplished is as follows :—An official was told off to visit certain districts and villages. On arrival he ascertained the actual quantity of grain which it was proposed to mortgage. He then drew up a document in which the amount belonging to each individual was enumerated, and in which it was stated that the grain was handed over to the owners collectively. This document was signed by all parties. They were also warned that should any of the grain thus mortgaged be sold, used, or in any way disposed of until the debt was discharged, criminal proceedings would be instituted against all of them. Thus they were made controllers of each other and joint guardians of Government property.

In this manner the producer obtained money to pay his debts without having to sell at the lowest price offered.

Salt

Annex B shows a very large fall in the export of salt; 10,150 tons were exported in 1891, 4,980 tons in 1892, and only 1,450 tons in 1893. This salt comes from the Sivash, or Putrid Sea, and, as

a rule, is sent to the north of Russia either by rail or sea. The falling-off in the trade at this port shows that the salt is either shipped in the Azov, at Ghenichesk, or goes direct by land.

As a rule, the price of this article is about 9 c. per pood, f.o.b. ^{Price of salt.} (about 12s. a ton), for the first quality, and about 8 c. for second quality (about 10s. 6d. per ton).

Eupatoria appears as the strongest competitor in the salt market, and it is only on account of the difference in freight that makes it worth while to export this article from here at all. The reason is that vessels have to load from lighters at Eupatoria while lying at anchor in the roads, and occasionally a ship remains idle for days at a time whenever there is any sea on. The price of salt at Eupatoria, f.o.b., is about 2s. 8d. per ton cheaper than at Sevastopol. On the other hand, freights run from 6d. to 1s. 6d. and more higher at the former place.

Among exports not specified in the return were horses and ^{Horses and} cattle. Thus 55 horses, mostly for saddle or light vehicle, ^{cattle.} 84 bullocks, 356 cows, and 5,941 sheep were sent to Turkey.

There being no means of obtaining reliable information as to ^{Imports.} the quantity of goods imported, no return is given. The chief articles of import were iron and steel goods and machinery, destined principally for the Government and the Russian Steam Navigation Company's shipbuilding yards.

One cargo of 2,300 tons of Cardiff coal was imported by the ^{Coal.} municipality of Sevastopol. This step was taken to ensure the poorer classes from being forced to pay famine prices for Russian coal, as during the autumn months all the rolling stock on the railways was occupied in transporting grain, and it was feared that when the Sea of Azov froze up the lines would be blocked by snow, and that in consequence no coal would be able to reach this place.

The town and suburbs are, as a rule, free from any infectious ^{Public health.} diseases, and although cholera did visit Sevastopol it was only for a short time and in a very mild form, very few succumbing to it.

Many new houses are springing up all about the town, and ^{New} with the exception of one or two ruined houses, which stand out ^{buildings} in glaring relief from the surrounding edifices, few traces remain of its former dilapidated appearance.

**Annex A.—RETURN of all Shipping at the Port of Sevastopol
during the Year 1893.**

ENTERED.

Nationality.	Sailing.		Steam.		Total.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.
British	...	...	154	203,826	154	203,826
Russian	...	...	50	46,100	50	46,100
Norwegian	...	...	17	24,770	17	24,770
Danish	...	...	15	18,483	15	18,483
French	...	...	13	15,780	13	15,780
Greek	7	2,350	12	12,410	19	14,760
German	...	...	4	9,150	4	9,150
Italian	1	306	4	4,618	5	5,324
Dutch	...	...	1	2,096	1	2,096
Austrian	2	920	...	...	2	920
Turkish	8	600	...	...	8	600
Total	18	4,376	270	337,223	288	341,599
.. for the year preceding ...	31	3,727	156	181,784	187	185,511

CLEARED.

Nationality.	Sailing.		Steam.		Total.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.
British	...	...	149	197,728	149	197,728
Russian	1	110	52	46,018	53	47,028
Norwegian	...	...	17	24,770	17	24,770
Danish	...	...	15	18,483	15	18,483
French	...	...	13	15,780	13	15,780
Greek	8	2,350	10	9,356	18	11,806
German	...	...	4	9,150	4	9,150
Italian	1	306	3	3,088	4	3,544
Dutch	...	...	1	2,096	1	2,096
Austrian	2	920	...	...	2	920
Turkish	8	600	...	...	8	600
Total	20	4,636	264	327,309	284	331,945
.. for the year preceding ...	20	3,599	156	180,485	186	184,084

Annex B.—RETURN showing the Principal Articles of Export
from Sevastopol during the Years 1893-92.

Articles.	1893.		1892.	
	Quantity.	Value.	Quantity.	Value.
	Tons.	£	Tons.	£
Wheat	159,492	877,210	108,152	599,231
Rye	21,378	99,407	1,689	7,350
Barley	130,625	437,593	27,746	100,746
Oats	23,462	92,675	2,263	8,679
Linseed	3,850	34,071	1,555	12,891
Rapeseed	1,630	6,846	3,386	14,056
Maize	5,034	22,653	..	..
Flour	4,592	46,770	2,428	24,622
Oilcake	1,400	5,260	672	1,536
Salt	1,450	870	4,980	3,477
Other articles	..	8,942	..	6,135
Total	..	1,632,297	152,871	778,723

THEODOSIA.

The trade and commerce of Theodosia, although greatly increased by the opening of the Jankoi-Theodosia branch line of the Lozovo-Sevastopol Railway, has not assumed the proportions that were expected. The anticipation of the removal from Sevastopol to Theodosia of the commercial port it was thought would have encouraged the growth of trade more than it has done. As the order for the said removal seems as far as ever from being carried out, it cannot be imagined that trade and shipping will desert such a fine harbour as Sevastopol, where there is almost every facility, for such a port as Theodosia, where the want of even ordinary means of loading vessels is severely felt.

The most serious impediment to shipping, and therefore to trade in general, is the great want of means (1) for storing grain, &c., and (2) for conveying the same to the ships.

The limited number of warehouses and the excessively high prices for their hire, the transport of cargoes to vessels lying in the roadsteads by means of lighters, all make it difficult to compete with Sevastopol, where vessels of the greatest draught can be berthed alongside any of the numerous loading jetties, close to which there are many warehouses and granaries.

Besides all this the railway tariff per wagon from any station beyond the junction, viz., Jankoi, is the same to Theodosia station as to Sevastopol port, and an extra charge of 1 r. (about 2s. 2d.) is made for sending a wagon from Theodosia station to the port, whereas Theodosia is some 32 miles nearer to Jankoi than Sevastopol, and in any case the tariff should not be higher.

The original plan of making the harbour sufficiently large to

Commerce.

Removal of commercial port from Sevastopol to Theodosia.

Want of loading facilities.

Railway tariff.

New harbour.

accommodate 15 steamers in its foreign section, has been departed from, and the actual space which is to be allotted for the said purpose will, I am informed, barely provide berths for 8 vessels.

Breakwater. The breakwater, which runs off in an easterly direction from the south-western extremity of the bay, is practically finished. For some reason or other this breakwater has been made too narrow to permit of its being used for loading purposes, and will remain as a breakwater pure and simple.

On this account a considerable portion of the harbour will really be wasted.

The other projection, at the eastern end of the harbour, has been commenced upon, and the work of filling in the portion of the harbour on which the railway line from the station to the port is to run, and on which the custom-house, sundry stores and quays are to be built, has also been started.

Elevators. It is now proposed to construct two elevators on the new quay instead of ordinary grain warehouses, which was the original plan of the engineers in charge of the harbour works. Piles are being driven into the mud and are to serve as foundations for one of the elevators in question.

Coal yard. The municipality has suggested the advisability of a coal dépôt being built within the limits of the port territory at the expense of the Government, in view of the fact that all coal is brought by water.

Wooden jetties. The old wooden jetties belonging to the Russian Steam Navigation and Trading Company are still standing and continue to be used by their mail boats and other steamers.

Period of completion of harbour. According to all accounts the harbour will not be completed before the spring of 1896 at the earliest.

Shipping and navigation. The total number of foreign vessels which called at Theodosia during 1891 was 16, viz.:—14 British, 1 Russian, and 1 Austrian steamer. During 1892 this figure increased to 21, and comprised 19 British, 1 Greek, and 1 Italian steamer.

The following figures show that during 1893 only 48 per cent. of the total number of foreign vessels and 65 per cent. of their aggregate tonnage were British.

RETURN of all Shipping at the Port of Theodosia during the Year 1893.

Nationality.	Steam.		Sailing.		Total.	
	Number of Vessels.	Tons.	Number of Vessels.	Tons.	Number of Vessels.	Tons.
British	25	31,000	—	—	25	31,000
French	3	4,018	—	—	3	4,018
Greek	4	6,000	—	—	4	6,000
Italian	2	3,100	—	—	2	3,100
Belgian	1	1,200	—	—	1	1,200
Austrian	1	1,000	—	—	1	1,000
Turkish	—	—	12	442	12	442
Total	37	45,300	12	442	49	45,742

Of this number 9 British, 2 French, 1 Italian, and 1 Austrian steamer came to fill up, and 2 British and 1 Italian left with part cargoes to fill up elsewhere.

These figures do not include the regular mail steamers and vessels of the coasting trade which call continually, and which, if enumerated, would not give a fair estimate of the actual trade of the port.

The export of cereals (the only produce exported from Theodosia) during the year 1893 more than doubled that of the previous year, and more than trebled that of 1891, as the following return shows:—

Year.	Wheat.	Barley.	Oats.	Linseed.	Total.
	Tons.	Tons.	Tons.	Tons.	Tons.
1891.. ..	16,876	2,140	..	400	19,416
1892 . . .	21,031	5,282	..	482	26,795
1893.. ..	35,843	16,236	5,140	1,283	58,502

TABLE showing the Countries to which the said Grain was Exported during the Year 1893.

Country.	Wheat.	Barley.	Oats.	Linseed.	Total.
	Tons.	Tons.	Tons.	Tons.	Tons.
France	6,855	4,686	4,136	682	16,359
Belgium	13,527	1,710	..	601	15,838
Spain	6,429	6,555	..	..	12,984
Italy	6,161	468	..	..	6,629
Algiers	..	2,000	..	..	2,000
Turkey	..	544	..	..	544
Great Britain ..	..	..	520	..	520
America	..	..	154	..	154
Russia	2,871	273	330	..	3,474
Total	35,843	16,236	5,140	1,283	58,502

The cargoes stated to have been shipped to Russian ports are actually only part cargoes, the vessels on which they were loaded having merely proceeded to some other ports in the Black Sea to fill up.

The imports from foreign countries are as yet very small, and as a rule, anything from abroad destined for Theodosia is landed either at Odessa or at Sevastopol, whence it is conveyed in vessels of the coasting trade to its destination.

Most of the grain shipped at Theodosia during 1893 on vessels of the coasting trade was conveyed to the Caucasus, and thence to the famine stricken provinces of the Transcaspian districts.

A large quantity of flour and wheat was sent by the same vessels to Yalta.

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AND FINANCE.

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REPORT FOR THE YEAR 1893
ON THE
TRADE OF THE DISTRICT OF THE CONSULATE-
GENERAL AT WARSAW.

REFERENCE TO PREVIOUS REPORT, Annual Series No. 1286.

*Presented to both Houses of Parliament by Command of Her Majesty,
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R U S S I A.

WARSAW.

Consul-General Grant to the Earl of Kimberley.

My Lord,

Warsaw, July 6, 1894.

I HAVE the honour to transmit herewith to your Lordship my Commercial Report for the year 1893, and I beg leave to explain that it has not been possible for me to send it sooner, because I have had to condense the statistics of three years instead of one, those for 1890 and 1891 having reached me almost simultaneously with those for 1892.

Owing to the form in which these statistics are drawn up, the imports and exports of 72 Polish custom-houses have to be worked out in detail in order to arrive at the results which are necessary for the compilation of Tables A, B, and C, required by the Consular instructions, and it is therefore a work which takes up a great deal of time.

A further delay has been occasioned by the recent unavoidable absence of my clerk who had prepared the tables, and without whose assistance I could not check the work he had done.

I have, &c.

(Signed) HENRY GRANT.

Report on the Trade and Commerce of Russian Poland for the Year 1893.

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RATES of Exchange for Foreign Money, Weights, and Measures
adopted in this Report.

11.	= 8 r. 62 c. in 1890, 9 r. 7 c. in 1891, and 9 r. 60 c. in 1892 for imports and exports, and 10 r. for other items.
1 cwt.	= 3½ poods.
1 quarter	= 2½ korzebs (Polish).
1 ton	= 62 poods.
1 mile	= 1½ versts.
1 acre	= 900 sq. sazhen.
1 bushel	= ½ tchetvert.
1 gallon	= ¼ of a vedro.

Trade and Commerce.

Having at last succeeded in procuring the "Obzors" published by the Russian Government for 1890-92, relative to the imports and exports of those 3 years respectively, I can now fill up the gap which was left in my commercial report of last year,* in this respect, by Tables A, B, and C, in the appendix, in which will be found the usual particulars relative to the principal articles imported and exported to and from the district of this Consulate-General, in the course of the 3 years aforesaid.

The "Obzor" for 1893, respecting the imports and exports through the Polish custom-houses, has not yet been published.

The total value of the imports through the Polish custom-houses rose in 1890 to 18,317,030*l.* (an increase of over 4,500,000*l.* as compared to the preceding year); in 1891, to 20,756,146*l.*; and in 1892, to 22,976,054*l.*

This considerable increase was not due to any development of the import trade of Poland itself, but almost entirely to the transit trade from Germany to Russia through the Polish custom-house of Wierzbolowo, which rose from 4,894,921*l.* in 1890, to 14,627,496*l.* in 1892, mainly owing to an increased importation of precious metals, as will be seen in the footnote to Table A in the appendix.

Notwithstanding the absence of statistics, it may safely be asserted that the import trade of the year 1893 must have been greatly below the average, having been crippled by the tariff war with Germany.

From the month of August to the end of the year hardly any German goods came into Poland.

About the time when all trade transactions ceased between Germany and Russia, the new commercial treaty with France came into force, but its effects were, at first, neutralised by the difficulties which arose relative to the certificates of origin; even after they were removed, however, there was not any very great increase in the imports from France, at any rate, not to an extent that could at all make up for the deadlock with Germany.

Had there been any prospect of the tariff war lasting for any length of time, there can be no doubt that Great Britain would have stepped in and profited by it to a very considerable extent; but in expectation of an early conclusion of the treaty of commerce which was being negotiated between Russia and Germany, the Polish merchants abstained from importing from England, except what was absolutely necessary, for fear of finding themselves later on with a large stock of more expensive articles on their hands which would have to be sold at a loss as soon as the cheap German goods were readmitted on normal conditions.

Nevertheless the importation of English goods did certainly increase during the suspension of the Russo-German commercial relations, especially in such articles as drapery, Cleveland iron, leather belts, cotton belts, &c.

* Annual Series No. 863.

Competition
of German
imitation of
British goods.

Poland is, I am told, inundated with cheap German goods imitating British manufactures, and the genuine English article has little or no chance of making way against a competition of this sort, backed up as it is by an army of well trained commercial travellers, and by an organisation of credit which facilitates all transactions. One of the great difficulties which foreign merchants and manufacturers have to deal with in this country is that of the constantly varying exchange, and I am told that it is got over in Germany by the bankers at Berlin guaranteeing a limit and taking the risk of loss or gain upon themselves.

Bicycles.

A branch of British trade which has very much developed of late is that of bicycles, the demand for which has increased immensely, and our manufacturers of the article almost entirely monopolise the Polish market up to the present.

Other articles
imported
from Great
Britain.

The importation of cotton thread continues to be in our hands, as far as I am able to ascertain, and a fairly good trade has been done in agricultural machinery and implements, spinning frames, power looms, and drapery.

Exports.
Decrease in
1892.

It will be seen by referring to Table B, before-mentioned, that the exports of the year 1892 fell to 12,589,863*l.*, or nearly 7,500,000*l.* less than in the previous year. For this the famine in Russia was mainly responsible, as the exportation of wheat had to be stopped in consequence. According to the statistics that have been published, the transit trade through the Wierzbolowo custom-house contributed about 1,000,000*l.* to the falling-off, so that the exports of the kingdom of Poland itself cannot have fallen off, in round numbers, less than 6,500,000*l.*

Corn.

The exportation of corn through the Polish custom-houses fell from 14,905,260 cwts. in 1891 to 4,287,066 cwts. in 1892, and in 1893 it must have been almost nil, as it ceased completely from August to the end of the year.

The German market has always been one of the great outlets for Russian wheat and rye; but the tariff war of 1893, and the restrictions imposed in consequence of the famine in the preceding year, have done much to alter the course of trade in this article, and notwithstanding the facilities secured by the Russo-German treaty it will have some difficulty in resuming its former position.

Export of
wheat and rye
to Germany,
1880-93.

Two interesting statements bearing on this subject have been published by the "Gazeta Handlowa" (Commercial Gazette) of Warsaw. They show the total amount of wheat and rye, imported by Germany, during the last 11 years respectively from Russia, Austria, the United States, and other countries. These statements appear to me to convey such a clear idea of the situation, that I think it well to give copies of them in the appendix (Tables D and E). It will be seen that up to the year 1891 Germany had been in the habit of drawing upon Russia and Poland for her wheat and rye deficits to the extent of from 38 per cent. to 86 per cent.; but that when, owing to the circumstances alluded to above, the Russian market was closed against her, in 1892 and 1893, she had no difficulty in procuring what was wanted from other countries, especially from the United States. It must not, however, be forgotten that in the year 1893 the harvest was an

exceptionally good one in Germany, and also that corn had become, as it continues to be, a drug in the markets of the world, so that the self imposed strain of that year can hardly be taken as a test of what might have happened under different circumstances.

According to the custom-house returns the export of spirits Spirits. has fallen off very much, only 464,548 gallons having left the Export country over the Polish frontier in 1892, 1,034,415 gallons in fallen off 1891, and 1,046,000 gallons in 1890, whereas in previous years through it had ranged from 4,000,000 to 6,000,000 gallons. This falling- Polish off is not, however, due to any diminution in the production of custom- the article, nor in its actual exportation, but to the fact that the houses. Lithuanian spirits, and those of some of the eastern governments of the kingdom of Poland, are now shipped mostly from Libau (which is not in the district of this Consulate-General), instead of going over the Polish-German frontier as they used to do, and they do not, therefore, now figure in the returns of the Polish customs to the same extent as formerly.

The timber trade in 1891-92 was below that of normal years, Timber. and did not amount to more than three-fifths of what it was in Falling-off in 1890. In round numbers it fell from a value of 2,500,000*l.* in the exportation. latter year to 1,500,000*l.* in 1891 and 1892 respectively. The reasons given for this remarkable decrease are (a) the heavy snow falls in the winter 1891-92, which stopped all access to the forests; (b) the drought in the spring which rendered the navigation of the rivers difficult; (c) the cholera, with its quarantine regulations; and, finally, that the exportations of the preceding years had been excessive.

Shipping and Navigation of the Vistula.

The attention which is now being given to the regularisation of Vistula the rivers of the Empire tends to bring the Vistula again into navigation. prominence as a water way, but for the present the traffic is insignificant. According to a report of the Ministry of Finance there were in the year 1890 only 24 steamboats, estimated altogether at 50,000*l.* and 661 tons burden. All other vessels numbered 710, valued at 103,000*l.* and 50,600 tons burden.

Population and Industries.

According to the last census, taken in the year 1893, the total Population of population of the city of Warsaw, exclusive of the permanent Warsaw. garrison, consisted of 501,021 souls (239,852 males and 261,169 females) who have been classed as follows:—Hereditary nobles, 9,920; personal (or life) nobles, 27,313; clergy, 350; privileged citizens, 2,149; merchants, 7,989; tradespeople, 43,150; artisans, 76,488; populace ("Mieszczenie"), 282,962; soldiers of the reserve, at home on leave, and their families, 36,734 (20,036 males and 16,698 females); foreign subjects, 13,966.

This is an increase of not less than 69,157 inhabitants in the Increase of. (1826) A 4

course of the last 8 years, the census of 1886 having given a total of 431,864 inhabitants.

Jews from
Moscow.

Among the immigrants to the city of Warsaw there is a large number of Jews who have been expelled from Moscow. They belong to the wealthier and higher class of Jews, and are, therefore, considered as an acquisition. According to the "Warszawski Dniownik" (Warsaw Journal) the emigration of peasants from the kingdom of Poland began about 20 years ago. The first movement was initiated by a Polish refugee who had made a fortune in the United States, and under his guidance a considerable number of peasants from the government of Plock went over there and prospered. These in their turn sent money to their relatives, encouraging them to follow, and the emigration assumed considerable proportions. Some of the most prosperous of these emigrants returned to Poland, and have, says the "Warszawski Dniownik," become models for their neighbours far and near.

Emigration.

To the
United States.

To Brazil.

To Siberia.

The news of this successful emigration having spread among the peasants, it prepared the ground for the subsequent emigration to Brazil in 1890 (mentioned in my report for that year*) which, fostered by unscrupulous agents and steamboat companies, proved disastrous to thousands and thousands of Polish peasants. Now the tide of emigration seems to be turning eastward. The "Volshsky Viestnik" (Volga Courier) says: "Among the emigrants to Siberia on the re-opening of the navigation this year there were a great many Poles. These Polish emigrants are a novelty. They only differ from the Russians by their dress and language. A few days ago a party of 30 families from the Polish government of Radom left Nijni-Novgorod for Tomsk, where they have relatives. They had very little money, and some of them had already been to Brazil."

Public health.

The public health in general was fairly good in the year 1893, but there were 3,999 cases of cholera, and 1,848 deaths in the kingdom of Poland.

Banks and
companies.

The considerable rise which has lately taken place in the shares of some of the leading companies on the Warsaw Stock Exchange has been commented on rather unfavourably owing to the impression that it had been brought about artificially. It is said that this stock-jobbing is the "contre-coup" of the St. Petersburg Bourse, where some of the Polish companies have been taken in hand for speculative purposes, conspicuous among them being the Lilpop-Rau Engineering Works, the Starachowice Iron Works, and the Dnieper Navigation Company, whose shares have gone up respectively from 45*l.* to 62*l.*, 14*l.* to 18*l.*, and 118*l.* to 141*l.*

Prices of
shares,
dividends, &c.

"The Commercial Gazette" of Warsaw, a newspaper of high standing in this city, has taken occasion of the excitement caused by this speculative movement to publish a list of the Polish private companies whose shares are quoted on the Warsaw Bourse, together with the original nominal value of the shares, their prices during the last 3 years, and the dividends paid by them. It is an

interesting statement, because it conveys much useful information on a subject in respect of which it is, as a rule, difficult for an outsider to procure any reliable data. I have, therefore, had a copy made of it which will be found in the Appendix (Table F). It will be seen from this statement what high dividends are paid by Polish banks and industries. Out of 26 companies only one (Lilpop-Rau) has paid no dividend; all the others have paid from 5 per cent. to 25 per cent., except one which paid only $1\frac{1}{2}$ per cent. When we see a cotton textile factory like that of Zawiercie, which is quite one of the most respectable and solid establishments of the kind in Poland, yielding a dividend of 19 per cent. one ceases to wonder that a certain class of British textile manufactures should have disappeared from the scene in this country. With such profits, and with the bounty now granted by the Government in the form of a reimbursement of duty to cotton textiles manufactured in Russia when exported to foreign countries, the question arises whether they will not in time drive our textiles out of many other foreign markets besides their own.*

High dividends.

Profits and bounty on textiles render competition impossible.

According to the official statistics reproduced by the Warsaw Spirits. newspapers, the spirit campaign of the year 1893 in the kingdom of Poland, and the north-western governments, yielded 7,551,192 gallons in the former, and 8,795,817 gallons in the latter, against 5,335,426 gallons and 7,002,239 gallons respectively in the year 1892.

Yield of, in 1892-93.

The output of sugar of first crystallisation in the kingdom of Poland during the campaign 1893-94 amounted to 2,068,987 cwts., which is 218,263 cwts. more than the preceding year. This production is greatly in excess of what is required for local consumption, nevertheless owing to the famous Kiew convention prices are artificially kept up; but there are symptoms that the Polish beet-root planters are beginning to have enough of the "ring" and are preparing to free themselves from its thralldom by building their own factories. Several instances of this are already reported from the different governments. It is very doubtful, however, whether they will be able to hold their own against the powerful combination aforesaid, which is making enormous profits at the expense of the consumers. According to the "St. Petersburg Gazette" they have been selling abroad at the rate of $1\frac{3}{4}d.$ per lb., sugar which cost them, on the premises, $1\frac{1}{2}d.$ per lb., while the same sugar was selling at Kiew at $4d.$ per lb. These figures speak for themselves and require no comment, and the "St. Petersburg Gazette" expresses its regret that sugar should have inadvertently been left out of the list of food products which Russian law protects against combinations of this sort.

Sugar industry.

Increased output of.

Kiew convention.

Prices of sugar in the country and abroad.

The production of zinc in the kingdom of Poland is limited to Zinc mines.

* The Ukase of December 31, 1892, fixed the rates at which the reimbursement on exported textiles is to be made as follows:—(a) On tissues and yarns, bleached or not, 1 r. 50 c. per pood of 36 lbs. (b) On tissues and yarns, dyed and printed (except those which are Turkey-red dyed), 1 r. 70 c. per pood. (c) On tissues and yarns dyed Turkey-red, 2 r. per pood. These rates came into force on July 1, 1893.

Output in
1892.

the districts of Olkusz in the government of Kielce and Będzin in the government of Piotrkow. According to the "Gazeta Handlowa" ("Commercial Gazette"), of Warsaw, the total output in the year 1892 was as follows: —Smelted zinc in plates, 84,167 cwts.; rolled zinc leaf, 46,180 cwts.; white zinc, 12,476 cwts. The quantity of zinc obtained from the smelting of the ore was 11,825 cwts. more than in the year 1891.

Iron mines.

Output of,
in 1892.

According to the same authority the iron mines of Russian Poland in the year 1892 produced 2,915,372 cwts. of pig-iron, 1,187,230 cwts. of manufactured iron, and 1,289,580 cwts. of steel, being in excess of the preceding year by 507,404 cwts. as regards pig, and 327,262 cwts. as regards steel, but there was a falling-off of 235,203 cwts. in the manufactured class of iron.

Public Works.

Improvements in the
city of
Warsaw.
Wooden
pavement.

Now that the waterworks and sewers are completed, or nearly so, in the principal parts of the town, the authorities are turning their attention to the street pavements which leave much to be desired, and they have given the preference to the wood pavement which is already being laid down in some of the principal thoroughfares, and is eventually to be extended to the whole city.

Night
refuges, cheap
kitchens, and
workhouses.

The "Police Gazette" has published an account of what has been done by the Chief of the Police for providing night refuges, food, and work for the unemployed and the poor in general. In the course of the years 1892 and 1893 ten refuges ("barracks" they are called here) with cheap kitchens and tea rooms, four night lodgings, and two workhouses were built in different parts of the city of Warsaw with the funds of the "Control of Servants Bureau," which were handed over for this purpose to the Chief of the Police by a Decree of the Governor-General, and with funds raised by voluntary contributions. These institutions are quite adequate to meet the most pressing wants of the needy portion of the population, providing as they do 10,000 rations of cheap and nourishing food daily, a night's rest for 800 roofless persons, and the means of earning something for 400 of them, which number will be gradually increased as, by degrees, the workhouses are enlarged. The Chief of the Police, to whom the entire credit of these beneficent institutions is due, has now published a minute account of the monies received and spent, showing an expenditure of 67,000*l.*, and a balance in hand of 29*l.* He considers his task finished, and hands over to the proper authorities and to public charity the mission of further consolidating and developing the work he has begun for the benefit of the poor inhabitants of this city.

Railways,
receipts of,
in 1893.

A statement of the receipts of the different railways of the kingdom of Poland per mile, showing the increase or decrease as compared with the preceding year, has been published by the Ministry of Communications, from which it results that the "Warsaw-Vienna" line has increased its receipts per mile by 10 per cent., the "Ivangorod-Dombrówka" line by 15·2 per cent., the "Łódź" by 11·9 per cent., and the "Vistula" by 1·8 per cent.

Increase and
decrease of.

All these have been worked by private companies. The "Warsaw-Terespol" line, which has been purchased by the Government, shows a falling-off of 2·1 per cent. Table G in the appendix will serve to show how considerable the increase of receipts per mile has been since the year 1887.

It seems settled, says the "Gazeta Handlowa" ("Commercial Gazette") of Warsaw, that the projected line from Warsaw to Ostrolenka is not to be a direct one between those two places, but that it is to join the Vistula line at Jablonna, whence the communication with Warsaw will continue on the existing line. The permanent way has been constructed as far as Zagroby on the left bank of the River Narew, but no rails have yet been laid down.

The works for the continuation of this line to Ostrolenka are to be commenced next autumn.

Agriculture.

The information respecting the harvest results, published by the newspapers, is rather meagre.

The "Gazeta Handlowa" puts down the total acreage under wheat and wheat in the kingdom of Poland in the year 1893 at 4,395,030 acres, and under rye at 1,359,817 acres, which yielded respectively 7,484,425 and 2,911,239 quarters, against 7,016,013 quarters of wheat, and 2,574,246 quarters of rye in the preceding year. It was, therefore, quite an exceptionally good harvest, but the growers have not as yet derived any benefit from it, for corn has been almost unsaleable in Poland since midsummer, 1893. What with the prohibitive tariff put on by Germany, and with the excessively low prices, the holders of corn found positively no buyers at any price, except just what was required for local consumption; and the opening up of the German frontier by the Russo-German treaty does not appear to have improved matters in this respect. There has scarcely been any demand from that quarter, and there is no record of prices having been so low as during the last few months. The most recent quotations in the month of May are absolutely disheartening, having fallen to 18s. 10d. per quarter for wheat, and 12s. 2d. for rye. The average cost of production of wheat in Poland is put down at about 19s. per quarter, so that present prices leave a deficit of about 1s. per quarter, which is a most disastrous state of things. Were it not for the beetroot and potato crops, which are remunerative because they feed the sugar and spirit industries, the landed interest would be completely ruined. Table H, in the appendix, gives the average prices of wheat and rye during the last 10 years respectively, as published by the "Gazeta Handlowa."

The highest price for wheat was attained in 1892 (1l. 15s. 10d. per quarter), and for rye in 1891 (1l. 8s. 3d. per quarter), but the prices of the preceding 10 years were much higher, having ranged from 1l. 18s. to 2l. 3s. per quarter for wheat, and from 1l. 3s. to 1l. 16s. per quarter for rye.

The total yield of the beetroot crop in 1893 amounted to 714,771 tons, against 529,333 tons in the previous year. The

New railway,
Warsaw to
Ostrolenka.

Low prices of.

Landed
interest saved
by spirit and
sugar
industries.

Prices of
wheat and
rye for
10 years.

Beetroot crop.

average yield per acre was 127 cwts., against 107 cwts. in the previous year.

Potatoes.

The potato crop in the year 1893 extended over an area of 91,859 acres in the kingdom of Poland, and 70,259 acres in the north-western provinces (Kowno, Grodno, Vilna, and Minsk), and yielded 7,523,060 cwts. in the former, and 5,320,193 cwts. in the latter, altogether 12,843,163 cwts., being 947,049 cwts. less than in the year 1892.

Wool fair.

At the annual wool fair held at Warsaw in the month of June, 1893, upwards of 19,611 cwts. of wool were sent up from the country for sale, and 1,157 cwts. remained over from the stock of the previous year, making altogether 20,768 cwts. on the market, of which 12,964 cwts. were sold. There was no demand for extra fine wool. Of the total 12,964 cwts. which were disposed of during the fair, 5,400 cwts. consisted of fine, 5,528 cwts. of middling, and 2,036 cwts. of common wool.

The washing and sorting of the wool is said to have been most satisfactory. Prices ranged per 120 lbs. from 10*l.* 4*s.* to 12*l.* 4*s.* for first quality, extra fine; 8*l.* 10*s.* to 10*l.* 4*s.* for second quality, extra fine; 7*l.* to 8*l.* 10*s.* for middling fine; and 5*l.* 10*s.* to 7*l.* for the common quality.

Cattle.

Import and export of.

Details respecting the import and export of cattle through the Polish custom-houses during the years 1890-92 respectively will be found in Table I in the appendix. It will be seen that the export of horned cattle has been almost nil, and that sheep fell from 14,703 head in 1890 to 1,398 in 1892, while swine and horses held their own. The import of cattle generally cannot be controlled, because, for the years 1891-92, the statistics published by the Russian Government only give their total value or weight.

No statistics have yet been published under this head for the year 1893.

Cattle diseases.

The cases of cattle diseases of different kinds in the year 1893, according to official returns furnished me by the Governor-General of the kingdom of Poland, have been as follows:—

Description.	Number.
Cattle plague.. .. .	12
Pneumonia	516
Foot-and-mouth disease	6,932
Sheep-pox	219
Sheep-scab	5
Glanders and farcy	304
Swine fever	5,802
Anthrax	515
Rabies.. .. .	20

Annex A.—RETURN of Principal Articles of Import to the District of the Consulate-General at Warsaw during the Years 1890-92.

Articles.			1892.		1891.		1890.	
			Quantity.	Value.	Quantity.	Value.	Quantity.	Value.
				£		£		£
Textiles—								
Cotton ...	Cwts.	...	23,227		5,280		7,420	
Woollen ...	"	...	55,497		9,860		10,200	
Raw cotton ...	"	...	316,801		163,360		142,620	
" wool ...	"	...	89,338		38,160		41,720	
Steel and iron goods ...	Tons	...	37,375		9,164		10,348	
Machinery ...	"	...	18,507		24,278		18,373	
Pig-iron ...	"	...	158,549		18,276		81,758	
Herrings, cured ...	Cwts.	...	799,892		556,840		874,520	
Tea ...	"	...	405,235		31,020		68,760	
Coal ...	Tons	...	268,769		138,718		155,673	
All other articles ...		...		11,521,354		13,025,219		15,522,885
Precious metals§ ...		...		11,454,700		7,720,927		2,794,145
Total ...		...		22,976,054*		20,756,146†		18,317,030‡

* Of this amount 14,627,496£. through the Wierzbolowo custom-house, mostly in transit to Russia.

† " 11,332,580£.

‡ " 4,894,921£.

§ Gold in bars and coins, in transit to Russia.

Annex B.—RETURN of Principal Articles of Export from the District of the Consulate-General at Warsaw during the Years 1890-92.

Articles.			1892.		1891.		1890.	
			Quantity.	Value.	Quantity.	Value.	Quantity.	Value.
				£		£		£
Cereals ...	Cwts.	...	4,287,066		14,905,260		12,283,620	
Sugar ...	"	...	233,262		680,460		201,100	
Spirits ...	Gallons	...	464,548		1,034,415		1,046,000	
Leather ...	Cwts.	...	85,940		16,502		90,340	
All other articles...		...		11,111,078		18,647,493		16,548,395
Timber ...		...	Not given	1,478,785	Not given	1,640,042	Not given	2,450,262
Total ...		...		12,589,863*		20,187,535†		18,998,657‡

* Of this amount 4,383,489£. through the Wierzbolowo custom-house, mostly in transit from Russia.

† " 5,245,438£.

‡ " 7,764,999£.

Annex C.—TABLE showing Total Value of all Articles Exported from and Imported to the District of the Consulate-General of Warsaw from and to Foreign Countries during the Years 1890-92.

Country.	Exports.			Imports.		
	1892.	1891.	1890.	1892.	1891.	1890.
	£	£	£	£	£	£
Over German frontier ...	12,429,628	16,811,233	16,098,515	22,948,250	11,077,671	13,017,371
Over Austrian frontier ...	160,235	3,376,302	2,900,142	27,804	1,947,548	2,505,514
Total ...	12,589,863	20,187,535	18,998,657	22,976,054	13,025,219	15,522,885

Annex D.—TABLE showing the Quantity of Wheat Imported Yearly by Germany from Russia as compared to that Imported from other Countries from 1883–93.

Year.	From Russia.			From Austria.			From the United States.			From other Countries.			Total.
	Quantity.	Per Cent. of Total.	Tons.	Quantity.	Per Cent. of Total.	Tons.	Quantity.	Per Cent. of Total.	Quantity.	Per Cent. of Total.	Quantity.	Per Cent. of Total.	
1883..	..	..	245,110	38.8	200,229	33.7	41,705	6.6	144,696	20.9	631,801	Tons.	
1884..	..	..	320,789	43.2	81,518	11.0	71,095	9.6	278,287	36.2	742,639	631,801	
1885..	..	..	318,131	50.5	10,090	8.2	28,314	5.0	170,934	30.3	563,409	742,639	
1886..	..	..	149,585	51.9	13,207	16.1	16,449	6.1	66,765	25.9	248,976	563,409	
1887..	..	..	251,822	46.8	102,786	19.1	53,216	9.9	130,970	24.2	508,834	248,976	
1888..	..	..	151,571	45.3	110,683	35.5	2,147	6.4	62,015	12.8	354,476	508,834	
1889..	..	..	290,563	58.3	132,663	26.1	2,473	4.7	77,208	10.9	508,747	354,476	
1890..	..	..	364,083	55.1	109,432	16.5	51,174	7.7	136,191	20.7	681,995	508,747	
1891..	..	..	756,934	58.6	64,491	5.0	219,814	19.4	269,300	17.0	1,279,312	681,995	
1892..	..	..	143,137	11.7	36,345	2.9	647,887	52.7	401,121	32.7	1,229,482	219,814	
1893..	..	..	21,295	3.1	23,469	3.4	309,969	44.7	337,702	48.8	662,375	401,121	

RUSSIA.

Annex E.—TABLE showing the Quantity of Rye Imported Yearly by Germany from Russia as compared to that Imported from other Countries from 1883-93.

Years.		From Russia.		From Austria.		From the United States.		From other Countries.		Total.
		Quantity.	Per Cent. of Total.	Quantity.	Per Cent. of Total.	Quantity.	Per Cent. of Total.	Quantity.	Per Cent. of Total.	Quantity.
1883..	..	Tons. 445,482	57.3	Tons. 40,170	5.2	Tons. 17,225	2.2	Tons. 274,168	35.3	Tons. 777,045
1884..	..	566,242	58.9	19,037	2.0	14,005	1.4	362,275	37.7	961,559
1885..	..	421,212	54.7	11,099	1.4	9,161	1.2	328,228	42.7	769,700
1886..	..	329,425	58.3	2,029	0.4	3,298	0.6	230,513	40.7	566,265
1887..	..	416,833	65.3	5,404	0.8	7,647	1.2	208,659	32.7	638,543
1888..	..	470,430	72.1	11,854	18.2	353	0.5	170,174	9.2	652,811
1889..	..	920,189	86.8	16,055	1.5	5,012	0.4	118,474	11.3	1,059,780
1890..	..	750,461	85.3	8,718	0.9	20,324	2.8	99,800	11.0	879,903
1891..	..	729,384	73.9	39,649	4.0	80,749	8.2	137,451	13.9	987,183
1892..	..	79,483	16.1	32,152	6.5	132,919	26.9	248,785	50.5	493,339
1893..	..	100,366	44.1	383	1.7	18,195	8.0	108,663	46.2	227,607

Table F.—STATEMENT showing the Nominal Value and the Prices and Dividends of Shares of Private Companies Quoted on the Warsaw Stock Exchange since 1892.

Name of Company.	Nominal Value of Shares.	Prices.				Dividends.		
		End of 1892.		End of 1893.		May, 1894.		1891.
		From—	To—	From—	To—	From—	To—	
	£ s.	£ s.	£ s.	£ s.	£ s.	£ s.	£ s.	Per cent.
Warsaw-Vienna Railway ..	6 0	18 10	19 0	19 4	20 0	21 10	21 10	9
Banque de Commerce ..	25 0	40 0	40 6	44 16	45 4	51 16	51 16	6½
Banque d'Escompte ..	25 0	35 0	34 8	36 18	37 0	40 12	40 12	9
Banque de Commerce of Lodz ..	25 0	46 0	..	50 0	..	45 10	45 10	7½
Warsaw Insurance Company ..	12 10	23 0	23 10	21 0	23 0	28 18	28 6	10
Insurance Company, Przerzno ..	25 0	27 10	28 10	28 10	30 0	27 10	30 0	9
Częstochowa Sugar Factory ..	25 0	25 10	26 10	26 10	27 10	28 16	28 16	6½
Częstochowa Sugar Factory ..	50 0	40 0	45 0	48 0	..	48 0	..	..
Łódź Sugar Factory ..	37 10	100 0	106 0	116 0	..	116 0	..	1½
Hutwick Sugar Factory ..	25 0	30 10	31 0	34 0	35 6	37 10	37 10	15
Hutwick Sugar Factory ..	25 0	25 6	26 0	26 10	27 10	28 10	28 10	10
Łódź Sugar Factory ..	50 0	68 0	70 0	82 10	90 0	90 0	90 0	8
Konstancja Sugar Factory ..	50 0	10 0	15 0	15 0	16 10	15 0	15 0	7
Łódź Sugar Factory ..	25 0	29 10	30 10	34 14	35 0	37 10	37 10	25
Łódź Sugar Factory ..	25 0	60 0	60 0	67 0	70 0	70 0	70 0	1½
Warsaw Company ..	50 0	95 0	..	120 0	125 0	125 0	125 0	9
Łódź Sugar Factory ..	100 0	25 0	30 0	44 0	45 0	62 4	62 4	15
Lilpop Bau Ironworks ..	10 0	10 8	10 14	14 6	14 10	18 10	18 10	21
Stachowice Ironworks ..	25 0	34 10	35 10	29 0	..	28 0	28 0	..
Warsaw (oil) Company ..	25 0	83 14	84 0	63 4	64 0	57 2	57 2	6
Zawiercie (cotton) ..	10 0	7 0	..	7 0	7 10	8 2	8 2	..
Batla Company ..	50 0	62 0	63 10	60 0	..	60 0	60 0	5
Łódź Sugar Factory (leather) ..	50 0	50 0	50 0	50 0	..	60 0	60 0	10
Szczekla (paper) ..	50 0	66 0	70 0	80 0	..	79 0	79 0	14
Warsaw Paper Company ..	50 0	70 0	72 0	106 0	118 0	141 10	141 10	8
Łódź Sugar Factory ..	12 10	20 0	..	12 10	19 0	19 0	19 0	10
Łódź Sugar Factory ..	12 10	20 0	..	12 10	19 0	19 0	19 0	12
Łódź Sugar Factory ..	12 10	20 0	..	12 10	19 0	19 0	19 0	6

* Not yet published.

Annex G.—POLISH Railways.

Lines.	Receipts per Mile.			Increase or Decrease per Mile in 1893 Compared to 1892.
	1887.	1892.	1893.	
	£	£	£	Per cent.
Warsaw-Terespol (State) ..	1,350	1,124	1,101	— 2·1
Warsaw-Vienna (private) ..	3,854	3,183	3,501	+ 10·0
Ivangorod-Dombrova (private)	417	917	1,057	+ 15·2
Lodz (private)	2,858	5,186	5,804	+ 11·9
Vistula	864	1,314	1,338	+ 1·8

Annex H.—AVERAGE Price of Wheat and Rye at Warsaw
during the Years 1885-94.

Years.					Average Price per Imperial Quarter.	
					Wheat.	Rye.
					£ s. d.	£ s. d.
1885					1 11 4	1 1 9
1886					1 10 9	1 0 10
1887					1 14 3	1 0 9
1888					1 10 5	0 15 8
1889					1 9 5	1 0 8
1890					1 8 7	1 1 2
1891					1 15 7	1 8 3
1892					1 15 10	1 7 8
1893					1 7 10	1 0 1
1894 (mid-May) ..					0 18 10	0 12 2

Annex I.—TABLE showing Import and Export of Cattle through
the Polish Custom-houses during the Years 1890-92.

Description of Cattle.	Imported.			Exported.		
	1890.	1891.	1892.	1890.	1891.	1892.
	Head.	£	Cwts.	Head.	Head.	Head.
Oxen and cows ...	509	} 25,542	49,799	12	15	19
Swine	...			6,544	79,310	53,743
Sheep	...			14,703	43,392	1,398
Horses	666			39,463	48,700	49,030

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